

# **MEDICARE BENEFICIARY DATABASE (MBD)**

**Centers for Medicare and Medicaid Services (CMS)**

*User's Manual for Central Office and Regional Offices*

**Version 7.2**

**Contract: 500-02-0040**

**May, 2004**

**FINAL**

**Prepared by:**



12011 SUNSET HILLS RD  
RESTON VA 20190

**REVISION HISTORY**

Date	Version	Reason for Change	Author
	1.0		
09/03	7.0		Clare Gahagan
01/04	7.1	<p>Quarter 1 2004 Release changes:</p> <p>RRB format of HICN can be entered on Bene Profile and will be converted and displayed in CMS format.</p> <p>E00039 Search edit no longer requires a Last name with a contract number. CAN, SSN or Last Name is required on all searches.</p> <p>New format for Bene Address window.</p>	Clare Gahagan
5/2004	7.2	<p>Quarter 2 2004 Release changes:</p> <p>Added MBD Help Desk information. Refer to page 12.</p> <p>Refer to updated pages 64 through 73.</p> <p>Updated Coverage tab window with new data fields (refer to Figure 28 and Table 19).</p> <p>Updated Coverage tab window to revise the field text "Cost/HCPP" to instead read as: "HCPP" under the <i>Delivery Option</i> field in the Beneficiary Service Delivery Elections scroll box (shown in Figure 28).</p> <p>Added a Drug Card Enrollment Detail window and new data fields (refer to Figure 29 and Table 20). Also added a button to this window for the Drug Card Disenrollment window.</p> <p>Added the Drug Card Disenrollment window and data fields (this window and function are only used in the CMS Regional Offices) (refer to Figure 30 and Table 21).</p>	Clare Gahagan

## APPROVALS

---

Greg McGuigan, CMS  
Project Officer

---

Date

---

Mark Koltz, Northrop Grumman  
Program Manager

---

Date

---

Deb Stewart, Northrop Grumman  
Project Manager

---

Date

---

Clare Gahagan, ViPS  
Author

---

Date

---

Chris Nicholaou, Northrop Grumman  
Quality Assurance

---

Date

## CONTENTS

<b>INTRODUCTION.....</b>	<b>1</b>
<b>Purpose.....</b>	<b>1</b>
<b>Document Overview.....</b>	<b>1</b>
<b>OVERALL DESCRIPTION.....</b>	<b>2</b>
<b>Data Tabs.....</b>	<b>2</b>
Bene Profile Tab .....	2
Entitlement Tab.....	3
Coverage Tab .....	3
Medicaid Tab .....	4
<b>USER FUNCTIONS .....</b>	<b>5</b>
<b>Logging In.....</b>	<b>5</b>
Instructions.....	5
<b>Logging Off and Exiting the MBD Application .....</b>	<b>11</b>
Purpose.....	11
Instructions.....	11
<b>MBD/EEVS Help Desk .....</b>	<b>12</b>
<b>Using the Main Menu .....</b>	<b>13</b>
Purpose.....	13
Instructions.....	13
<b>Inquiry Mode.....</b>	<b>13</b>
Unique Beneficiary Information .....	14
Getting Help with Descriptions of Codes .....	15
<b>Accessing Beneficiary Information .....</b>	<b>16</b>
<b>Viewing Beneficiary Profile Information.....</b>	<b>17</b>
Purpose.....	17
Instructions.....	22
<b>Using the History Buttons .....</b>	<b>23</b>
Viewing the Name History .....	24
Viewing the Social Security Number History .....	25
Viewing the XREF (Cross Reference) History.....	26
<b>Using the Beneficiary Search Feature.....</b>	<b>26</b>
Purpose.....	26

---

Instructions.....	29
<b>Viewing Beneficiary Search Results.....</b>	<b>31</b>
Purpose.....	31
Instructions.....	33
Viewing Detail Information.....	34
<b>Viewing Beneficiary Address Information .....</b>	<b>39</b>
Instructions.....	42
<b>Viewing Residence History.....</b>	<b>43</b>
Purpose.....	43
Instructions.....	44
<b>Viewing Beneficiary Communication Information.....</b>	<b>45</b>
Purpose.....	45
Instructions.....	47
<b>Viewing Rep Payee Communication Information .....</b>	<b>48</b>
Purpose.....	48
Instructions.....	50
<b>Viewing Miscellaneous Information.....</b>	<b>51</b>
Purpose.....	51
Instructions.....	53
Viewing Incarceration Status Information.....	54
Viewing Not Lawful US Presence Information.....	56
<b>Viewing Batch Exceptions Information .....</b>	<b>58</b>
<b>Viewing Entitlement Information .....</b>	<b>60</b>
Purpose.....	60
Instructions.....	62
Viewing Entitlement Audit History Information.....	62
<b>Viewing Coverage Information .....</b>	<b>65</b>
Purpose.....	65
Instructions.....	70
<b>Viewing Drug Card Enrollment Detail .....</b>	<b>70</b>
Purpose.....	70
<b>Viewing Beneficiary Service Delivery Elections Detail Windows .....</b>	<b>75</b>
Purpose.....	75
Instructions.....	79
<b>Viewing Contract Information for a Service Delivery Election .....</b>	<b>80</b>
Purpose.....	80
Instructions.....	81

---

<b>Viewing Managed Care Institutional Status Information .....</b>	<b>82</b>
Purpose.....	82
Instructions.....	85
<b>Viewing Hospice Detail.....</b>	<b>86</b>
Purpose.....	86
Instructions.....	87
<b>Viewing ESRD Detail.....</b>	<b>88</b>
Purpose.....	88
Instructions.....	90
<b>Viewing Other Insurance Profile Information.....</b>	<b>91</b>
Purpose.....	91
Instructions.....	92
<b>Viewing Medicaid Information.....</b>	<b>93</b>
Purpose.....	93
Instructions.....	96
<b>Viewing Maintenance Assistance Status.....</b>	<b>97</b>
Purpose.....	97
Instructions.....	99
<b>Viewing Basis of Eligibility Information.....</b>	<b>100</b>
Purpose.....	100
Instructions.....	101
<b>ERROR AND INFORMATION MESSAGES .....</b>	<b>103</b>

## LIST OF FIGURES

Figure 1: CMS Security Warning .....	6
Figure 2: CMS Welcome Page .....	6
Figure 3: Security Alert Window.....	7
Figure 4: Enter Network Password Window .....	8
Figure 5: Medicare Beneficiary Database Login Window .....	9
Figure 6: Login Window.....	10
Figure 7: Logging Off the MBD.....	12
Figure 8: Main Menu .....	13
Figure 9: Right-Click: What's This?.....	15
Figure 10: Accessing Beneficiary Information: Initial Bene Profile Tab.....	17
Figure 11: Bene Profile Tab with Beneficiary Data .....	18
Figure 12: Name History Pop-up Window .....	24
Figure 13: SSN History Pop-up Window .....	25
Figure 14: XREF History Pop-up Window .....	26
Figure 15: Beneficiary Search Criteria Window .....	27
Figure 16: Beneficiary Search Results Window .....	32
Figure 17: Beneficiary Search Detail Window.....	34
Figure 18: Beneficiary Address Information Window .....	39
Figure 19: State and County Code Pop-up Window.....	43
Figure 20: Beneficiary Communication Profile Window .....	45
Figure 21: Representative Payee Communication Profile Window .....	48
Figure 22: Miscellaneous Beneficiary Information Window .....	51
Figure 23: Incarceration Status Window .....	54
Figure 24: Not Lawful U.S. Presence Pop-up Window.....	56
Figure 25: Batch Exceptions Window .....	58
Figure 26: Entitlement Tab .....	60
Figure 27: Entitlement Audit History Window .....	62
Figure 28: Coverage Tab .....	65
Figure 29: Drug Card Enrollment Detail .....	71
Figure 30: The Drug Card Disenrollment Window .....	73
Figure 31: CCP Detail Window.....	79
Figure 32: Contract Information Window .....	80
Figure 33: Managed Care Institutional Status Information Window.....	82
Figure 34: Hospice Detail Window .....	86
Figure 35: ESRD Detail Information Window .....	88
Figure 36: Other Insurance Profile Window.....	91
Figure 37: Medicaid Tab.....	93
Figure 38: Maintenance Assistance Status Window.....	97
Figure 39: Basis of Eligibility Window .....	100

## LIST OF TABLES

Table 1: Unique Beneficiary Fields .....	14
Table 2: Bene Profile Window Information .....	18
Table 3: Name History Pop-Up Window Information .....	24

Table 4: SSN History Pop-Up Window Information.....	25
Table 5: XREF History Pop-up Window Information.....	26
Table 6: Beneficiary Search Criteria Window Information.....	28
Table 7: Beneficiary Search Results Window Information .....	32
Table 8: Beneficiary Search Detail Window Information .....	34
Table 9: Beneficiary Address Window Information.....	40
Table 10: Residence History Window Information .....	44
Table 11: Beneficiary Communication Profile Window Information .....	46
Table 12: Rep Payee Communication Profile Window Information.....	49
Table 13: Miscellaneous Beneficiary Information Window .....	52
Table 14: Incarceration Status Window Information.....	55
Table 15: Not Lawful US Presence Window Descriptions .....	57
Table 16: Batch Exceptions Window Information .....	58
Table 17: Entitlement Tab Information .....	61
Table 18: Entitlement Audit History Window Information.....	63
Table 19: Coverage Tab Information.....	66
Table 20: Drug Card Enrollment Detail Information .....	71
Table 21: Drug Card Disenrollment Window Information.....	73
Table 22: Service Delivery Election Detail Field Descriptions.....	76
Table 23: Contract Information Pop-up Window Information .....	80
Table 24: Managed Care Institutional Window Information.....	83
Table 25: Hospice Detail Window Information.....	87
Table 26: ESRD Detail Window Information .....	88
Table 27: Other Insurance Profile Window Information .....	92
Table 28: Medicaid Tab Information.....	94
Table 29: Maintenance Assistance Status Window Information.....	98
Table 30: Basis of Eligibility Window Information .....	101
Table 31: Error Messages .....	103

## LIST OF APPENDICES

Appendix A: Definitions, Acronyms, and Abbreviations	1
--	---



## INTRODUCTION

The Centers for Medicare and Medicaid Services (CMS) is moving toward an information-centered approach in terms of record keeping, with an initial focus on beneficiary data. One of the objectives in support of this goal is to establish a common enterprise-wide information solution that will provide for better data integration throughout the Medicare program. The realization of this objective will result in significant improvements in the way beneficiary information is stored, maintained, and reported.

The Medicare Beneficiary Database (MBD) was created in order to provide CMS with a centralized database that is able to communicate with other systems while being able to view, manage, and update beneficiary information. Once fully populated and integrated with other systems, the MBD will be the authoritative source of beneficiary information. The MBD will provide full support for the wide array of benefit plans and beneficiary choices. The beneficiary information contained in the MBD will be used to support managed care enrollments and payments to Managed Care Organizations (MCOs).

### ***Purpose***

The purpose of this document is to present a functional “how-to” manual of usage for the MBD application. Toward this end, the goal of this manual is to familiarize the user with the MBD application so that the user will be able to view and update beneficiary data.

The principal users of the MBD will consist of CMS personnel from Central Office, the Regional Offices, Medicare Customer Service Centers (MCSC), and the managed care plans.

### ***Document Overview***

This document contains the following sections and appendices:

- Section 1.0:** Includes the system purpose, and scope.
- Section 2.0:** Contains the overall description of the MBD application and background information on its function.
- Section 3.0:** Contains the overall view of each MBD function, and “how-to” guide for function usage.
- Section 4.0:** Contains a table of all errors messages in the MBD application.
- Appendix A:** Contains the definitions, acronyms and abbreviations used in this document.

## OVERALL DESCRIPTION

The MBD Graphical User Interface (GUI) allows users to view beneficiary data and update various data elements based on role-based security access.

Data contained within the MBD application is necessary to give a complete insurance profile of each beneficiary. Customer Service Representatives (CSRs) will be able to use this data as their access source to provide comprehensive responses to public inquiries regarding health insurance questions or issues.

The GUI application has two access modes: Inquiry and Update Beneficiary. Each mode is similar in appearance and design. The Inquiry mode is for the viewing of beneficiary information and allows no updating. The Update mode is for the updating of beneficiary information and allows all data to be viewed as well, as controlled by role-based security.

### ***Data Tabs***

The MBD data is separated into four different tabs: Bene Profile, Entitlement, Coverage, and Medicaid. There are buttons on each tab to access additional windows with related information. Below is a description of each tab and the associated buttons.

### ***Bene Profile Tab***

- Bene Profile Tab: provides the necessary information on personal characteristics to uniquely identify Medicare beneficiaries. Contained on this tab are buttons for:
  - ♦ Beneficiary Address: provides mailing, residence, and temporary residence address.
  - ♦ Beneficiary Communication Profile: provides information on how to contact the beneficiary and the selected choices a beneficiary has made regarding the receiving of correspondences, including language and delivery type. Also contained in this profile are survey/sample information fields and delivery choices for the beneficiary's Medicare Handbook (including suppression of the handbook).
  - ♦ Representative Payee Communication Profile: provides information on how to contact the representative payee and the selected choices a representative payee has made regarding the reception of correspondences, including language and delivery type. Also contained in this profile are survey/sample information fields and the representative payee's delivery choices for the Medicare Handbook.

- ♦ **Miscellaneous Information:** includes such information as Last Health Insurance Card Request Date and Social Security Administration (SSA) Benefit Payment Status Code.
- ♦ **Beneficiary Search:** provides you with a way to search for a particular beneficiary by other methods (for example, last name) when the Health Insurance Claim Number (HICN) is not known.
- ♦ **Batch Exceptions:** provides detailed information about the Batch errors that occurred while processing transactions for the beneficiary.

### ***Entitlement Tab***

This tab provides the data necessary to determine an individual's entitlement to Medicare, specifically, the periods of Part A and Part B enrollment coverage and also provides non-entitlement codes.

### ***Coverage Tab***

This tab provides data about Beneficiary Service Delivery Elections, Discount Drug Card Enrollments, and Other Coverage choices, which are defined below.

- ♦ **Beneficiary Service Delivery Elections:** provides current and historical beneficiary selections from the various service delivery options. For managed care elections, detail windows are available and include enrollment and disenrollment dates, contract information, and Plan Benefit Package (PBP) information.

There are three different categories available for viewing for these elections: Medicare + Choice Elections, Other Beneficiary Explicit Elections and Fee-For-Service (FFS) Periods. Fee-For-Service Periods are created as default in the MBD if the beneficiary has not made an election.

- *Medicare + Choice Elections:* There are two alternative options provided in this category of elections: Coordinated Care Plans (CCP) and Private Fee-For-Service (PFFS) plans. Each of these options contains unique information that can be viewed by pressing the Detail button.
- *Other Beneficiary Explicit Elections:* This includes Demonstrations and Cost/Health Care Prepayment Plan (Cost/HCPP). This option contains unique information that can be viewed by pressing the Detail button.

- *FFS Periods*: FFS periods are the default if no other option has been elected. There is no additional detail information for FFS.
- ♦ *Discount Drug Card*: provides discount drug card enrollment and transitional assistance information.
- ♦ *Other coverage*: includes current End Stage Renal Disease (ESRD) and Hospice periods. Historical hospice and ESRD periods are available by pressing the Detail button.

Also contained on this tab are buttons to display the:

- ♦ *Managed Care Institutional Status*: contains information about the current and historical periods of inpatient residence in a medical treatment facility, regardless of Medicaid eligibility status and where a beneficiary's health status warranted nursing home inpatient care, but the beneficiary remained in a non-institutional residence.
- ♦ *Medical Insurance Profile*: contains current and historical information about a beneficiary's insurance choices and coverage in addition to Medicare or Medicaid.

### ***Medicaid Tab***

This tab provides a profile of current and historical Medicaid eligibility periods. Data is included for Group Health Plan (GHP), Medicaid Statistical Information System (MSIS), and third-party providers.

## USER FUNCTIONS

### *Logging In*

To gain access to the MBD application, you must provide a User ID and password. Security measures ensure that only authorized personnel are able to access the MBD. Security rights are based on user roles so that only those users who have been assigned user roles authorized to update and view restricted information will have the ability to do so.

- If you do not have authority to view a particular MBD element, asterisks (\*\*\*) display in that field.
- If your user role does not have authority to update, add, or delete, the element will not be functional in the GUI.
- If your user role has authority to update but not delete, for example, a security error will prompt you if you attempt to delete the data in that field.

### *Instructions*

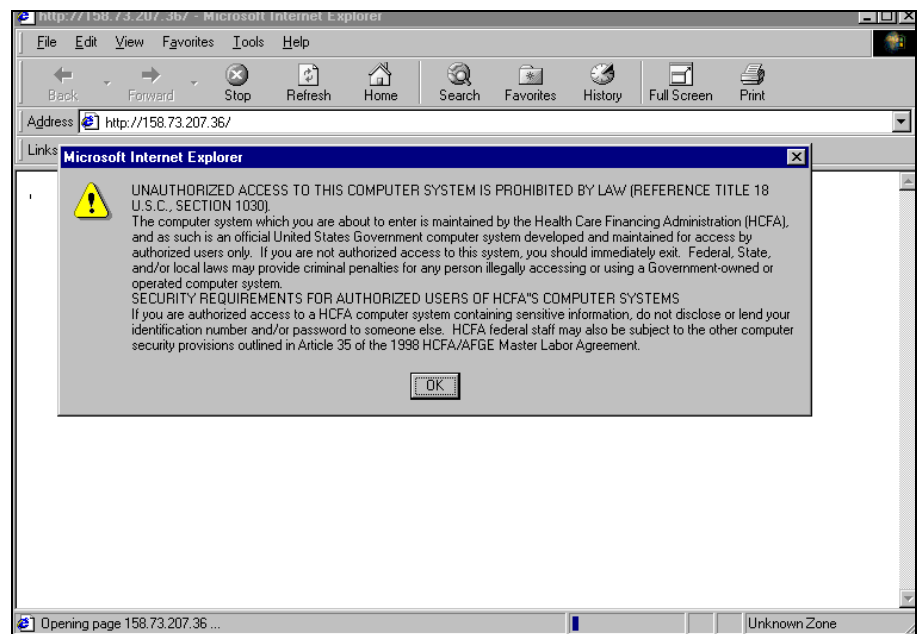
To access the MBD application:

- Double-click the **MBD shortcut** button.

A CMS Security Warning appears.

- Read the Security Warning, and click the **OK** button. (Refer to Figure 1.)

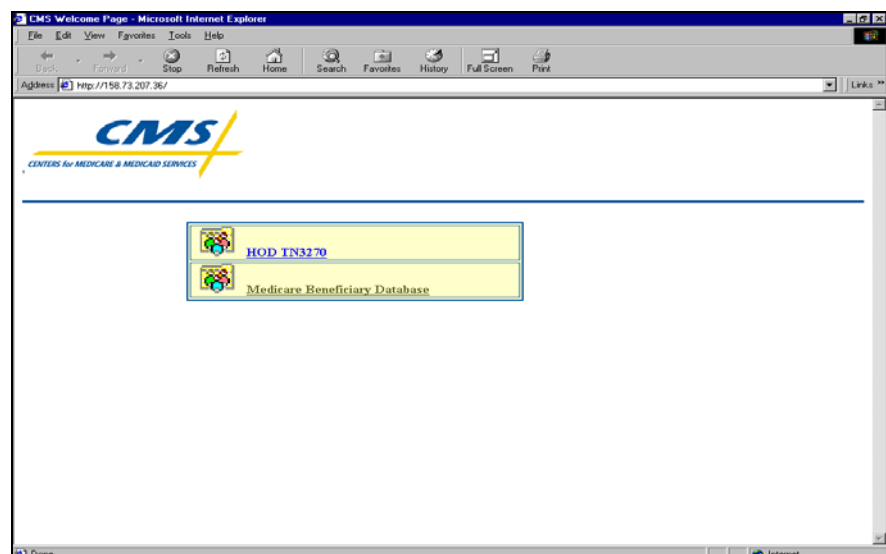
**Figure 1: CMS Security Warning**



The CMS Welcome Page is appears with two menu options.

- Click **Medicare Beneficiary Database** (this is the second option).

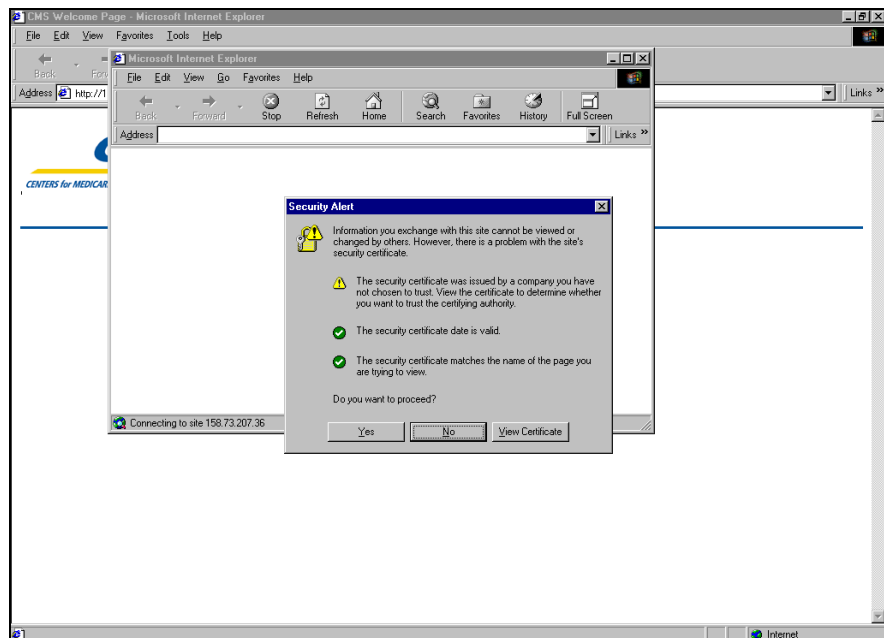
**Figure 2: CMS Welcome Page**



A Security Alert appears asking if you want to proceed.

- Click the **YES** button. (See Figure 3.)

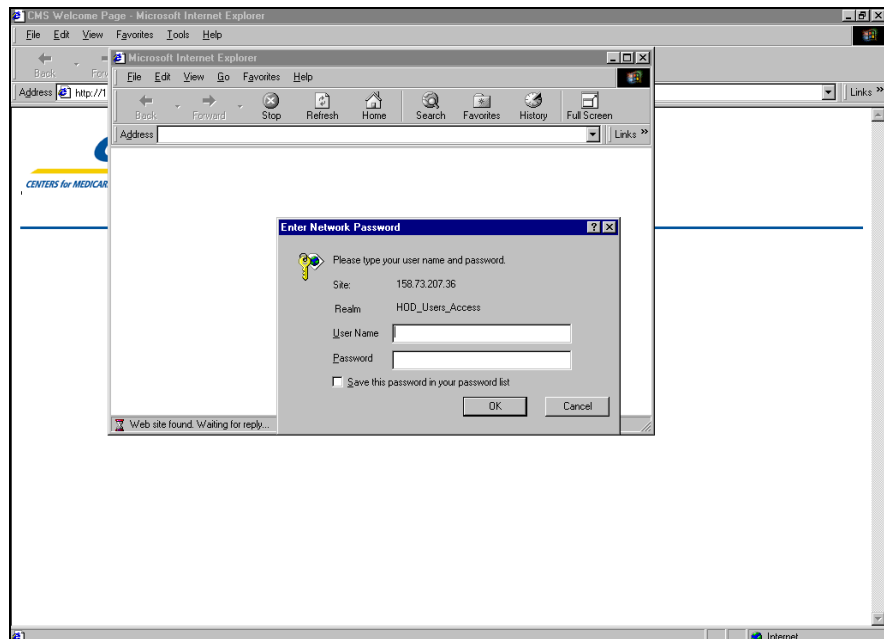
**Figure 3: Security Alert Window**



The Enter Network Password window appears.

- Type your *RACF ID*.
- Press the **Tab** key.
- Type your *Password*.
- Click the **OK** button. (See Figure 4.)

**Figure 4: Enter  
Network Password  
Window**

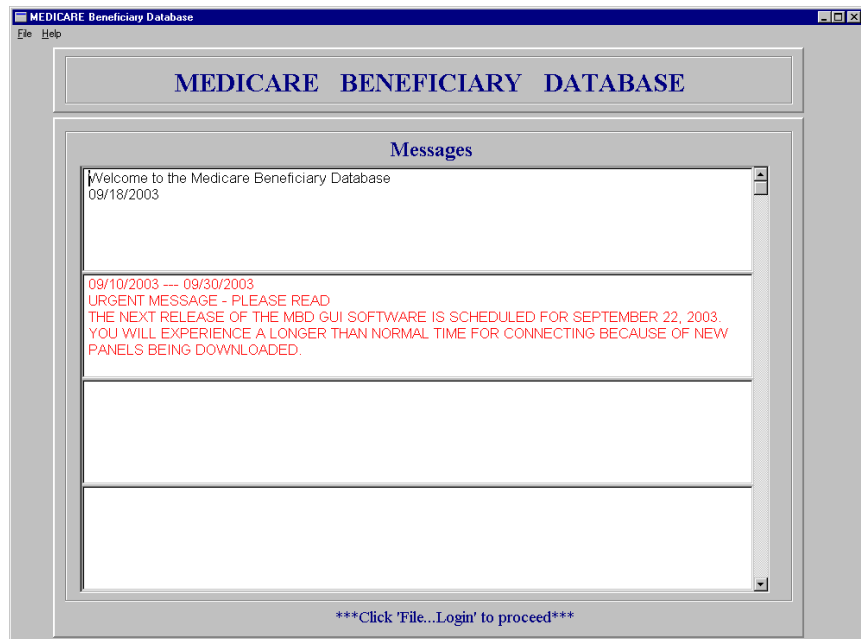


The Medicare Beneficiary Database Login window appears and displays MBD application messages.

There are two menu options. They are located in the top left corner and are labeled **File** and **Help** (see Figure 5).



**Figure 5: Medicare  
Beneficiary Database  
Login Window**



To log in to the system:

- Choose **File > Login** from the menu bar.

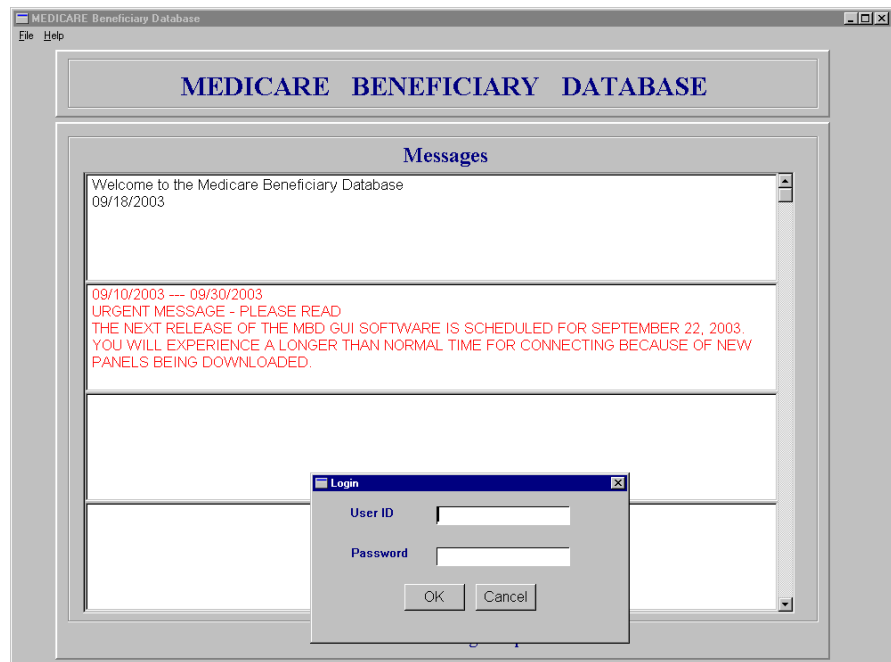
The Login window opens.

- Type your *User ID*.
- Press the **Tab** key.
- Type your *Password*.
- Click the **OK** button.

After you log in successfully, the Main Menu window appears.

For more information about using the Main Menu window, see **Instructions** (on page 13).

**Figure 6: Login Window**



***Invalid ID or Password  
Error Message***

If you enter an invalid User ID or password, an error message will display. The error message will state that an invalid user ID or password was supplied.

***Error Correction***

- Click the **OK** button to clear the error message.
- Reenter your *User ID* and *Password*.

If you continue to receive an error message, contact the System Administrator.

## ***Logging Off and Exiting the MBD Application***

### ***Purpose***

It is important that you exit and log off from the MBD application when you are finished using the system.

Security is of the utmost importance because information contained with the MBD application is sensitive.

The Logging Off window is shown in Figure 7.

### ***Instructions***

To log out of the MBD application:

- Click the **Exit** button until returned to the Main Menu.
- Click the **File** menu.
- Select **Logoff** from drop down menu.

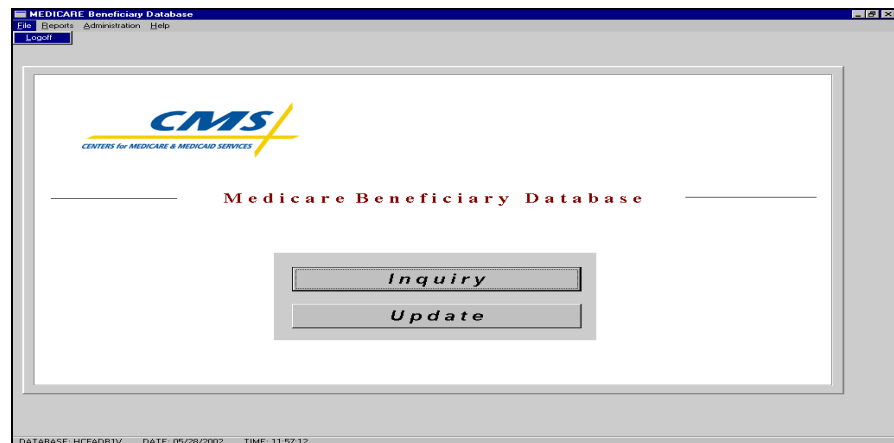
You are then logged out of the system.

To exit the MBD:

- Click on the **File** menu.
- Select **Exit** from the drop-down menu.

The MBD application is then closed.

**Figure 7: Logging Off  
the MBD**



### ***MBD/EEVS Help Desk***

If the System Administrators have any questions or need assistance with the MBD/EEVS system GUIs, they should first contact the MBD/EEVS Help Desk.

The MBD/EEVS Help Desk supports system user inquiries on a daily basis. The Help Desk is staffed from Monday to Friday between 8:00 a.m. to 5:00 p.m.

At all other times, users can create voice mail messages or send e-mail messages to the contact points provided below and the Help Desk Staff will respond as soon as possible.

Contact the MBD/EEVS Help Desk via telephone or e-mail, as follows:

#### **Monday to Friday, between 8:00 a.m. to 5:00 p.m. EST:**

- Telephone: **1-800-924-4736**
- E-mail: [eevs.helpdesk@ngc.com](mailto:eevs.helpdesk@ngc.com).

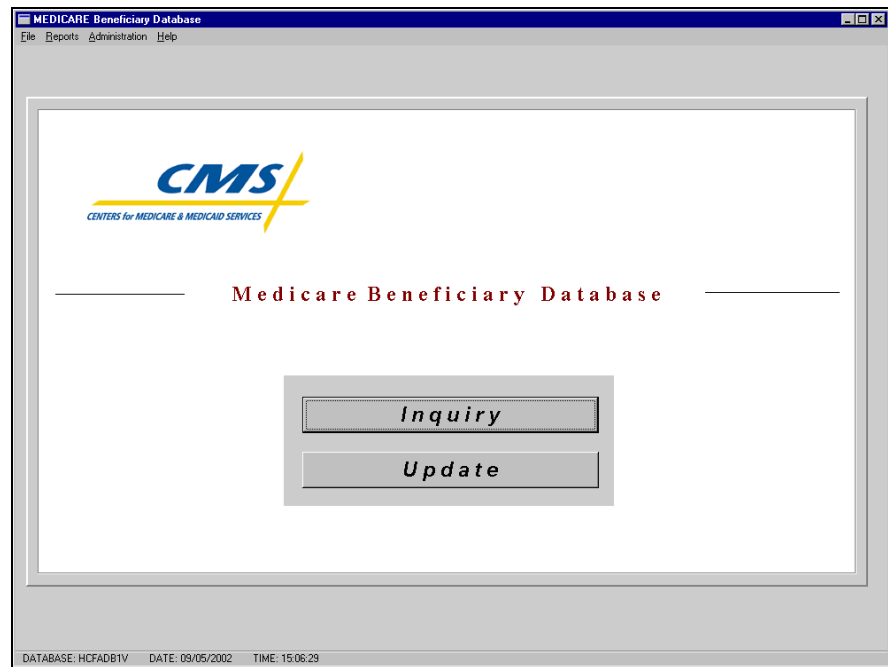
Note: When you send a voice mail or e-mail message clearly state (or type), your name, your telephone number, your organization, your e-mail address, and a brief description of the problem.

## **Using the Main Menu**

### **Purpose**

The Main Menu contains two buttons: Inquiry and Update (see Figure 8).

**Figure 8: Main Menu**



### **Instructions**

Click the corresponding button depending on your desired mode. A single click on either of these buttons will take you to the Bene Profile tab in the selected mode.

To access a beneficiary record in Inquiry mode:

- On the Main Menu, click the **Inquiry** button.

The Bene Profile tab window displays (see Figure 11).

### **Inquiry Mode**

The Inquiry mode of the MBD application is for the viewing of beneficiary data only. You cannot make any updates while you are in this mode, regardless of security role access.

On the top right corner of each window or tab, the word **Inquiry** is displayed. This is so you can easily know which mode you are in at any given time.

The MBD data is separated into four different tabs, each with its own subsections. For more information about the tabs, see **Data Tabs** (on page 2).

### **Unique Beneficiary Information**

At the top of each tab is an area of information that remains constant throughout the various tabs. This information includes the key fields used to identify the beneficiary. Information contained here includes the beneficiary HICN, Social Security Number (SSN), Sex and Source code, Date of birth, and Beneficiary Name and Source code. At the bottom of each window is a status bar containing the name of the database you are in, the current date, and the current time.

See Table 1 for a complete description of all the constant fields.

**Table 1: Unique Beneficiary Fields**

Unique Beneficiary Fields	
Fields	Description
HICN	Beneficiary's HIC number  Consists of Claim Account Number (CAN) and Beneficiary Identification Code (BIC).
SSN	Beneficiary's Social Security number  Or  Beneficiary Own Number (BOAN) as assigned by the SSA.
Sex	Beneficiary's sex  F Female M Male U Unknown
Src	Source feed for the beneficiary's sex code information.  EDB Enrollment database
Date of Birth	Beneficiary's date of birth.
Last Name	Beneficiary's last name.

First Name	Beneficiary's first name.
MI	Beneficiary's middle initial.
Src	Source feed for the last name of the beneficiary. EDB Enrollment database

### Getting Help with Descriptions of Codes

When you are viewing information about a beneficiary, you will see that some of the fields contain codes.

*To see the description of a code:*

- Right-click the code.

The **What's This?** button displays, for example:

**Figure 9: Right-Click: What's This?**

The screenshot displays the 'Beneficiary Data - Entitlement' application window. It features a tabbed interface with 'Entitlement' selected. Fields for beneficiary information are at the top, including HICN (123-45-6789A), SSN (123-45-6789), Sex (F), Src (EDB), Date of Birth (08/03/1915), and Name (Last: MOUSE, First: MINNIE, MI: M, Src: EDB). Below this are two tables: 'Part A Entitlement' and 'Part B Entitlement'. In the 'Part A Entitlement' table, the 'Enrollment Reason' field (containing the code 'I') is right-clicked, opening a context menu with a 'What's This?' button circled. The 'Part B Entitlement' table shows a single row with Effective Date 08/01/1980, Status Y, and Enrollment Reason G. At the bottom of the window are buttons for 'EXIT', 'Entitlement Audit History', and 'Print Screen'. The status bar at the bottom indicates 'DATABASE: HCFAD811', 'DATE: 06/12/2003', and 'TIME: 12:44:46'.

- Click **What's This?** to see a list of codes and descriptions.

*To close the list of codes and descriptions:*

- On the list window, click **OK**.

## ***Accessing Beneficiary Information***

To view information about a beneficiary:

- On the Bene Profile tab, enter a *HICN* (Claim Account Number (CAN) and Beneficiary Identification Code (BIC)).
- For Railroad Board (RRB) beneficiaries, the RRB format can be entered and it will be converted and displayed in CMS format.
- Press the **Enter** key or click the **OK** button.

After you enter this number, the application retrieves the beneficiary record and you can begin browsing the information and navigating through the various tabs and buttons. Please note that you can only enter the HIC number on the Bene Profile tab.

If any errors occur, see the **Error and Information Messages** section at the end of this manual.

## ***Field to Field Navigation***

When you first open the MBD, the Bene Profile tab opens, with the Entitlement, Coverage and Medicaid tabs behind it. The cursor is positioned on the HIC number field, and all fields are empty (see Figure 10).

You cannot navigate from tab to tab until you enter a valid HIC number. For information about entering a HIC number, see Instructions (on page 22).



**Figure 10: Accessing  
Beneficiary  
Information: Initial  
Bene Profile Tab**

**Beneficiary Data - Profile**

**Bene Profile** | Entitlement | Coverage | Medicaid | Inquiry

HICN  SSN  Sex  Src  Date of Birth

Name Last  First  MI  Src

**Beneficiary Profile**

XREF

Rep Payee ☐ Yes ☐ No

Rep Payee Name

Date of Death

DOD Proof Code

DOD Source

Verified Day of Death ☐ Yes ☐ No

Current Entitlement				
	Effective Date	Term Date	Status	Enroll Reason
Pt A	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Pt B	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Bene Address | Bene Communication | Rep-Payee Comm | Miscellaneous Info | Batch Exceptions

EXIT | Update | Cancel | Clear | OK | Bene Search | Print Screen

DATABASE: HCFAD81V DATE: 09/05/2002 TIME: 15:08:12

### **Viewing Beneficiary Profile Information**

#### **Purpose**

The Bene Profile tab (Figure 11) provides information about the beneficiary's personal characteristics, address and contact information.

See Table 2 for a complete description of all the fields contained on this tab.

**Figure 11: Bene Profile  
Tab with Beneficiary  
Data**

**Table 2: Bene Profile  
Window Information**

Bene Profile Window Information	
Fields	Description
XREF  <b>Hint:</b> You can click the H button to see the HIC number history.	Cross reference number – the beneficiary’s previous HIC number.
Rep Payee	Flag indicating whether or not the beneficiary has designated a representative payee.
Rep Payee Name	Name of the representative payee.
Date of Death	Beneficiary’s date of death (DOD).

Bene Profile Window Information	
DOD Proof Code	Date of death proof code.  <b>Right-click</b> in this field to see a list of the codes and descriptions.
DOD Source	Source feed (EDB or CSR) for the beneficiary's date of death information.
Verified Day of Death	Indicates whether or not a beneficiary's exact day of death has been verified.
<b>Current Part A Entitlement:</b>	
Effective Date	Medicare Part A entitlement effective date.
Term Date	Medicare Part A entitlement termination date.
Status	Medicare Part A entitlement status or non-entitlement reason.  <b>Right-click</b> in this field to see a list of the codes and descriptions.
Enrollment Reason	Reason for enrollment to Part A benefits:  <b>Right-click</b> in this field to see a list of the codes and descriptions.
<b>Current Part B Entitlement:</b>	
Effective Date	Medicare Part B entitlement effective date for a beneficiary.
Term Date	Medicare Part B entitlement termination date for a beneficiary.
Status	Medicare Part B entitlement status or non-entitlement reason.  <b>Right-click</b> in this field to see a list of the codes and descriptions.
Enroll Reason	Reason for a beneficiary's enrollment to Part A benefits.  <b>Right-click</b> in this field to see a list of the codes and descriptions.
Buttons	Description
H	History Buttons – Located next to SSN, Name and

Bene Profile Window Information	
	<p>XREF fields.</p> <p>If grayed out, no history available.</p> <p>For more information, see <b>Using the History Buttons</b> (on page 23).</p>
Bene Address	<p>Opens the Beneficiary Address window.</p> <p>For more information, see <b>Viewing Beneficiary Address Information</b> (on page 39).</p>
Bene Communication	<p>Opens the Beneficiary Communication Profile window.</p> <p>For more information, see <b>Viewing Beneficiary Communication Information</b> (on page 45).</p>
Rep-Payee Comm	<p>Opens the Representative Payee Communication Profile Window.</p> <p>For more information, see <b>Viewing Rep Payee Communication Information</b> (on page 48).</p>
Miscellaneous Info	<p>Opens the Miscellaneous Info window.</p> <p>For more information, see <b>Viewing Miscellaneous Information</b> (on page 51).</p>
Batch Exceptions	<p>Opens the Batch Exceptions window.</p> <p>For more information, see <b>Viewing Batch Exceptions Information</b> (on page 58).</p>
Exit	<p>Exits the current mode of operation the application is in.</p>
Update	<p><b>Note: This button is grayed out in Inquiry mode.</b></p> <p>Saves and updates all changes made to the beneficiary's record.</p>
Cancel	<p><b>Note: This button is grayed out in Inquiry mode.</b></p> <p>Cancels all information that was entered onto the window.</p>
Clear	<p>Exits the beneficiary's record that was open and brings up a clear Bene Profile window.</p>

Bene Profile Window Information	
OK	<p>Same functionality as the Enter key.</p> <p>Searches for the beneficiary HIC number and populates the Bene Profile window with the beneficiary record.</p>
Bene Search	<p>Starts the Beneficiary Search feature of the MBD application to drill down into beneficiary details.</p> <p><b>Hint:</b> Before you start a Search, click the Clear button. Then, enter the criteria to search by.</p> <p>For more information, see <b>Using the Beneficiary Search Feature</b> (on page 26).</p>
Print Screen	<p>Prints the current screen.</p>

## **Instructions**

To view a beneficiary's profile information:

- On the Bene Profile tab in the HICN field, enter a beneficiary's *HIC number*. (For Railroad Board beneficiaries, the RRB format can be entered and it will be converted and displayed in CMS format.)
- Press **Enter** or click the **OK button**.

The beneficiary's record is retrieved, and data displays on the Bene Profile tab (Figure 11).

**Note:** If you do not know the HICN, you can search for a beneficiary and enter a CAN in the HICN field or an SSN in the SSN field.

For information about searching for a beneficiary, see **Using the Beneficiary Search Feature** (on page 26).

To view a new beneficiary's profile information:

- Click the **Clear** button to clear the data from the current beneficiary record that is displayed on the tab before entering a new HIC number.

## ***Using the History Buttons***

The Bene Profile tab includes **H** buttons next to these fields:

- Name
- SSN
- XREF.

*To view* a history window for one of the fields:

- On the Bene Profile tab, click the **H** button next to the field.

The history information for the particular field displays in the pop-up window (see Figure 12 through Figure 14).

*To exit* from a history pop-up window:

- On the history pop-up window, click **OK**.

The window closes, and the display returns to the Bene Profile tab.

## Viewing the Name History

To view former beneficiary surnames, you can open the Name History pop-up window.

*For the steps to follow to enter open a History pop-up window, see **Using the History Buttons** (on page 23).*

**Figure 12: Name History Pop-up Window**

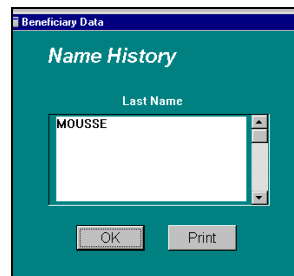


Table 3 shows the Name History Pop Up window functions.

**Table 3: Name History Pop-Up Window Information**

Name History Pop-Up Window Information	
Field	Description
Last Name	Displays former beneficiary surnames.
Buttons	Description
OK	Closes the Name History window.
Print	Prints the history information for this window.



### ***Viewing the Social Security Number History***

The SSN History window contains the beneficiary's former social security numbers.

*For the steps to follow to enter open a History pop-up window, see **Using the History Buttons** (on page 23).*

**Figure 13: SSN History Pop-up Window**

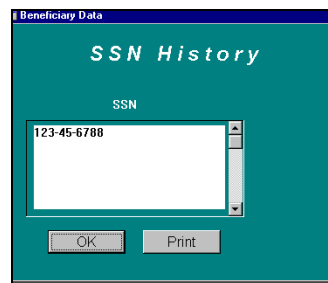


Table 4 shows the SSN History Pop Up window descriptions.

**Table 4: SSN History Pop-Up Window Information**

SSN History Pop-Up Window Information	
Field	Description
SSN	Displays beneficiary's former social security numbers.
Buttons	Description
OK	Closes the SSN History window.
Print	Prints the SSN history.

## Viewing the XREF (Cross Reference) History

The XREF History window contains the current and historical XREF numbers and a type of valid or invalid.

For the steps to follow to enter open a History pop-up window, see **Using the History Buttons** (on page 23).

**Figure 14: XREF  
History Pop-up Window**

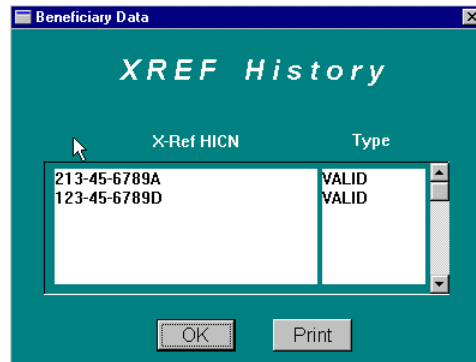


Table 5 shows the XREF History Pop Up window descriptions.

**Table 5: XREF History  
Pop-up Window  
Information**

XREF History Pop-up Window Information	
Fields	Description
X-Ref HICN	Current and historical XREF numbers.
Type	Cross reference type Valid Invalid
Buttons	Description
OK	Closes the XREF History window.
Print	Prints the XREF History information.

## Using the Beneficiary Search Feature

### Purpose

Use the Beneficiary Search Criteria window (Figure 15) to enter criteria to search for a beneficiary.

One of the following is *required*: Claim Account Number, SSN, or beneficiary last name. Additional optional search fields are available. There is no limit to the number of search fields you can use.

*For the steps to follow* to open this window, see **Instructions** (on page 29).

For a complete description of the fields on this window, see Table 6.

**Figure 15: Beneficiary Search Criteria Window**

**Beneficiary Search Criteria**

*Search Facility*

At least one of the following must be entered:

CAN  --

SSN  --

Beneficiary Name

Last  First  MI

Optional Criteria:

Sex

Date of Birth  11

State

ST/CTY Code

Zip Code  -

☒ SSA ☐ FIPS

☐ Residence ☒ Mailing ☐ Temp Residence ☐ All

Contract #  Include Former? ☒ Yes ☐ No

Similar Benes? ☐ Yes ☒ No

OK BACK Clear

Print Screen

DATABASE: HCFADBTV DATE: 09/18/2003 TIME: 10:31:45

**Table 6: Beneficiary  
Search Criteria Window  
Information**

Beneficiary Search Criteria Window Information	
Fields	Description
CAN	Claim Account Number.
SSN	Social Security Number.
Last Name	Beneficiary Last Name.  <b>Hint:</b> You can use an asterisk (*) as a wildcard when searching. You <i>must</i> enter 2 characters before the wildcard.
First Name	Beneficiary First Name.  <b>Hint:</b> You can use an asterisk (*) as a wildcard when searching. You <i>must</i> enter a character before the wildcard.
MI	Beneficiary Middle Initial.
Sex	Sex code F Female M Male U Unknown.
Date of Birth	Date of birth (MM/DD/CCYY).
Radio Buttons	Description
SSA	Select to enter a SSA ST/CNTY code.
FIPS	Select to enter a FIPS ST/CNTY code.
Fields	Description
State	State code.
ST/CNTY	State and county codes. Defaults to SSA. Select FIPS to search by FIPS codes.
Zip Code	Zip Code (5 or 9 digit).

Beneficiary Search Criteria Window Information	
Radio Buttons	Description
Residence/Mailing / Temp Residence/All	Default is search by residence address.  If no residence address is present, search by mailing address. If searching on state and county codes, the same criteria apply.
Field	Description
Contract #	Contract number of MCO.
Radio Buttons	Description
Include Former?	Defaults to Yes to search current and prior enrollments.  Click No to search only current enrollments.
Similar Benes?	Defaults to No.  Click Yes to display beneficiaries that have similar CANs and last names.
Buttons	Description
OK	Starts a search based on the criteria entered and displays the Search Results window.
BACK	Returns to Bene Profile tab.
Clear	Refreshes the Search Criteria window.

## Instructions

*To access* the beneficiary search criteria window:

- On the main Bene Profile tab, click the **Search** button.  
  
A search privacy disclaimer displays.
- Click the **OK** button.

The Beneficiary Search Criteria window displays.

*To search* for a beneficiary:

- On the Beneficiary Search Criteria window, enter information in at least *one* of the following fields: CAN, SSN, or the

beneficiary's last name. (You can enter additional criteria to narrow the search results.)

**Hint:** You can use an asterisk (\*) as a wildcard when searching using the last name. You *must* enter 2 characters before the wildcard.

You can also use an asterisk (\*) as a wildcard when searching using the first name. You *must* enter a character before the wildcard.

- Click the **OK** button.

The Beneficiary Search Results window displays.

See **Viewing Beneficiary Search Results** (on page 31) for more information about this window.

*To exit* from this window:

- Click the **BACK** button located at the bottom left-hand side of the window.

The Bene Profile tab displays.

## ***Viewing Beneficiary Search Results***

### ***Purpose***

The Beneficiary Search Results window (Figure 16) displays the results of your search request.

The Search Results Window displays the following beneficiary information:

- HICN
- SSN
- Last Name
- First Name
- MI
- Sex
- DOB
- ST
- ST/Cnty codes
- ZIP code
- address type.

*For the steps to follow to view this window, see Instructions (on page 33).*

See Table 7 for a complete description of all the fields and buttons contained on this window.





Beneficiary Search Results Window Information	
Fields	Description
ZIP	ZIP code.  All nine positions will display, if available.
Address Type	Address type indicator.  M      mailing  R      residence  T      temporary.
# of Matches	Number of matches that were found to your search criteria.
Buttons	Description
Back	Returns to the Beneficiary Search window.
Detail	Opens the Search Detail window.  For more information, see <b>Viewing Beneficiary Search Results</b> (on page 31).
OK	Selects the highlighted beneficiary and displays the selected beneficiary's record.
Print Screen	Prints the current screen.

## Instructions

*To view the Beneficiary Search Results window:*

- On the Beneficiary Search Criteria window, click the **OK** button or the **ENTER** key. (See page 29 for more information on entering search criteria.)

The results of your search display. (See Figure 16: Beneficiary Search Results Window.)

*To exit from this window:*

- Click the **BACK** button located at the bottom left-hand side of the window.

The Beneficiary Search Criteria window displays.

*To view the Bene Profile tab for the highlighted beneficiary:*

- Double-click on a beneficiary or highlight a beneficiary row and click the **OK** button.

*To display demographic details for the highlighted beneficiary:*

- Click the **Detail** button. For more information about the details that display, see Table 8.

## Viewing Detail Information

The Beneficiary Search Detail window (Figure 17) contains the demographic details of the highlighted row from the Beneficiary Search Results window.

See Table 8 for a complete description of all fields contained in this window.

**Figure 17: Beneficiary Search Detail Window**

The screenshot shows the 'Beneficiary Data - Bene Profile' window. At the top, it displays fields for HICN (123-45-6789A), SSN (123-45-6789), Sex (F), Src (EDB), and Date of Birth (08/03/1915). Below this, the Name is split into Last (MOUSE), First (MINNIE), MI (M), and Src (EDB). The main section is titled 'Search Detail' and contains several sub-sections: XREF (213456789A), Date of Death (//), Rep Payee (Yes/No), Resides with Rep Payee (Yes/No), Rep Payee Name, and Verified (Yes/No). There are three columns for addresses: Mailing Address (1234 RICHMOND RD, WILLIAMSBURG, VA 23185-2827, CSR), Residence Address (701 MONMOUTH AVE, SEVERNA PARK, MD 21146-3903, CSR), and Temporary Residence Address (117 E BROAD ST, ELIZABETHVLE, PA 17023-8671, CSR). Each address section includes fields for Address, City, ST / Zip, and Eff. Dates. At the bottom, there are fields for FIPS/SSA (24005, 21020, 24003, 21010, 42043, 39280) and buttons for BACK, OK, and Print Screen. The status bar at the bottom indicates DATABASE: HCFAD81T, DATE: 03/05/2002, and TIME: 16:04:01.

**Table 8: Beneficiary Search Detail Window Information**

Beneficiary Search Detail Window Information	
Fields	Description
HICN	Beneficiary's Health Insurance Claim number, consisting of Claim Account Number (CAN) and Beneficiary Identification Code (BIC).
SSN	Beneficiary's SSN or BOAN number as assigned by the SSA.
Sex	Sex of the Beneficiary  (F-female, M-male, U-unknown).
Src	Source for the beneficiary's sex code information.
Date of Birth	Birth date of the beneficiary.
Last Name	Beneficiary Last Name.
First Name	Beneficiary First Name.
MI	Beneficiary Middle Initial.
Src	Source for the last name of the beneficiary.
XREF	Cross reference number – the beneficiary's previous HIC number.
Rep Payee	Flag indicating whether or not the beneficiary has designated a representative payee.
Resides w/ Rep Payee	Indicates whether or not the beneficiary resides with the representative payee.
Rep-Payee Name	Name of the beneficiary's representative payee.
Date of Death	Date of the beneficiary's death (DOD).
DOD Code	Date of death proof code. Identifies the source of the date of death information from the EDB and indicates whether the month, day, or year of death can be updated by another source.  <b>Right-click</b> in this field to see a list of the codes and descriptions.
DOD Src	Source feed (EDB) for the beneficiary's date of death information.

Beneficiary Search Detail Window Information	
Verified	Flag indicating whether or not a beneficiary's exact day of death has been verified.
<b>Mailing Address</b>	Current mailing address for the beneficiary.
Address	Three lines of the street address.
City	City.
ST/Zip	State abbreviation  Zip code ( <i>In Update mode</i> , the MBD will provide a 9-digit code, even if you enter 5 digits.)  Source feed for the address.
Eff Dates	Effective date for mailing address.  <i>In Update mode</i> , you cannot enter an end date for mailing address.
FIPS/SSA	FIPS/SSA state and county codes.
Fields	Description
<b>Residence Address</b>	Current residence address of the beneficiary.
Address	Three lines of the street address.
City	City.
ST	State abbreviation.
Zip	Zip code. If a five-digit zip code is entered, Finalist will plug a nine-digit zip.
Source	Source feed for the address.
Eff. Dates	Effective dates for residence address.
FIPS/SSA	FIPS/SSA state and county codes.

Beneficiary Search Detail Window Information	
<b>Temporary Residence Address</b>	Temporary address of the beneficiary for when a beneficiary is temporarily in a nursing home or other institution.
Address	Three lines of the street address.
City	City.
ST	State abbreviation.
Zip	Zip code. If a five digit-zip code is entered, Finalist will plug a nine-digit zip.
Source	Source feed for the address.
Eff Dates	Effective date for temporary residence address. If an End Date is not entered, the system will default it to six months from the Start Date.
FIPS/SSA	FIPS/SSA state and county codes.
Buttons	Description
Back	Returns to the Search Results window.
OK	Displays the Bene Profile window for the beneficiary.
Print Screen	Prints the current screen.

## ***Instructions***

*To view search detail information:*

- On the Search Detail window, highlight a record to see detail information.
- Click the **Detail** button at the bottom of the window.

The detail window displays

*To exit from this window:*

- Click the **BACK** button located at the bottom left-hand side of the window.

The displays returns to the Beneficiary Search Results window.

*To view the Bene Profile tab:*

- Click the **OK** button.

## Viewing Beneficiary Address Information

### Purpose

The Beneficiary Address Information window (Figure 18) contains information about the beneficiary's address.

For the steps to follow to view this window, see **Instructions** (on page 42).

See Table 9 for a complete description of the fields in this window.

**Figure 18: Beneficiary Address Information Window**

**Beneficiary Address Information**

HICN: 123-45-6789A

**Mailing Address**

624 DEBAUGH AVE

City: TOWSON

ST / Zip: MD 21204 - 3808

Eff.Dates: 11/01/2003 To / /

Cons Code: Source:

**Residence Address**

1 MAIN STREET

City: ORLANDO

ST / Zip: FL 32808

Eff.Dates: 01/01/2000 To / /

Cons Code: Source:

**Temporary Residence Address**

GEBER

City: TOWSON

ST / Zip: MD

Eff.Dates: 03/01/2004 To 09/01/2004

Cons Code: Source:

**Resides with Rep Payee?**

☐ Yes ☐ No

**SCC History**

Back Cancel Update Print Screen

DATABASE: HCFADB1T DATE: 01/09/2004 TIME: 15:06:40

**Table 9: Beneficiary  
Address Window  
Information**

<b>Beneficiary Address Window Information</b>	
<b>Fields</b>	<b>Description</b>
HICN	Beneficiary's Health Insurance Claim number, consisting of Claim Account Number (CAN) and Beneficiary Identification Code (BIC).
<b>Mailing Address:</b>	Current mailing address and effective dates.
Mailing Address	Six lines of street address.
City	City.
ST	State abbreviation.
Zip	Zip code.  The system provides a 9-digit zip code.
Cons Code	Code assigned to the American Consulate in a foreign country.  This code identifies a foreign address in the MBD.
Eff.Dates	Effective date for mailing address.  In Inquiry mode, you cannot enter an End Date for mailing address.
Source	Source of the mailing address.
<b>Fields</b>	<b>Description</b>
<b>Residence Address:</b>	Current residence address and effective dates.
Address	Three lines of street address.
City	City.
ST	State abbreviation.
Zip	Zip code.  The system provides a 9-digit zip code.



Beneficiary Address Window Information	
Cons Code	Code assigned to the American Consulate in a foreign country.  This code identifies a foreign address in the MBD.
Eff. Dates	Effective dates for residence address.
Source	Source of the residence address information.
<b>Temporary Residence Address</b>	Identifies the temporary residence address and effective dates.
Address	Three lines of street address.
City	City.
ST	State abbreviation.
Zip	Zip code.  The system provides a 9-digit zip code.
Cons Code	Code assigned to the American Consulate in a foreign country.  This code identifies a foreign address in the MBD.
Eff.Dates	Effective date for temporary residence address.
Source	Source of the temporary residence address information.
Buttons	Description
Resides w/ Rep Payee	Indicates whether the beneficiary resides with the payee.
SCC History	Displays the state and county code history for the beneficiary.  For more information, see <b>Viewing Residence History</b> (on page 43).
Back	Returns to the Bene Profile tab.
Cancel	<b>Note: This button is grayed out in Inquiry mode.</b>  Cancels the update transaction.

Beneficiary Address Window Information	
Update	<b>Note: This button is grayed out in Inquiry mode.</b>  Updates all information entered in the fields.
Print Screen	Prints the current screen.

### ***Instructions***

*To view* the Beneficiary Address Information window:

- On the Bene Profile tab, click the **Bene Address** button.

The Beneficiary Address Information window appears for the current beneficiary (see Figure 18).

*To exit* from this window and return to the Bene Profile tab:

- Click the **BACK** button.

## Viewing Residence History

### Purpose

You access the State and County Code (SCC) History window (Figure 19) from the Beneficiary Address Information window. The SCC window displays current and historical state and county code periods.

*For the steps to follow to see the state and county residence history, see **Instructions** (on page 43).*

**Figure 19: State and County Code Pop-up Window**

Residence				Temporary Residence			
FIPS ST / CO	SSA ST / CO	Start Date	End Date	FIPS ST / CO	SSA ST / CO	Start Date	End Date
R 36 061	33 420	03/15/2003	03/14/2003	T 99 999	99 999	02/01/2003	08/01/2003
M 99 999	99 999	04/03/1989					

Table 10 contains information about the State and County Code History window.

**Table 10: Residence History Window Information**

Residence History Window Information	
Fields	Description
<b>Residence: Permanent residence SCC History.</b>	
FIPS ST/CO	Federal Information Processing System (FIPS) state and county codes.
SSA ST/CO	SSA state and county code.
Start Date	Date the state and county code became effective.
End Date	Date the state and county code was terminated.
<b>Temporary Residence: Temporary residence SCC History.</b>	
FIPS ST/CO	FIPS state and county codes.
SSA ST/CO	SSA state and county code.
Start Date	Date the state and county code became effective.
End Date	Date the state and county code was terminated.
Buttons	Description
OK	Returns to the Beneficiary Address window.
Print	Prints the current screen.

### Instructions

*To view the histories:*

- On the Beneficiary Address Information window, click **SCC History**.

The State and County Code History pop-up window (Figure 19) displays.

*To exit from the State and County Code History pop-up window:*

- Click **OK**.

The Beneficiary Address window displays.

## Viewing Beneficiary Communication Information

### Purpose

The Beneficiary Communication Profile window (Figure 20) provides you with contact information and the choices a beneficiary has made regarding the reception of correspondence and about the Medicare Handbook.

For the steps to follow to view this window, see **Instructions** (on page 47).

See Table 11 for a complete description of all the fields contained on this window.

**Figure 20:Beneficiary Communication Profile Window**

The screenshot shows a software window titled "Beneficiary Data" with a tabbed interface. The "Bene Profile" tab is selected. The window contains the following sections and fields:

- Header:** "Bene Profile", "Entitlement", "Coverage", "Medicaid", and "Inquiry" (a link).
- Identification Fields:**
  - HICN: 999-99-9999A, SSN: 999-99-9999, Sex: F, Src: EDB, Date of Birth: 08/03/1915
  - Name: Last: SMITH, First: MARY, MI: M, Src: EDB
- Beneficiary Communication Profile:**
  - Telephone Number: 410-111-1212, Fax Number: 410-111-2222
  - E-Mail Address: MINNIE.MOUSE@DISNEY.COI, EFT Address: (empty)
  - Language Preference: English (dropdown), Src: (empty)
  - Media Preference: Written (dropdown)
  - Survey/Sample Cumulative Total: (empty)
  - Survey/Sample Participation Indicator: Yes (radio), No (radio)
- Medicare Handbook Information:**
  - Correspondence Type: Handbook (dropdown), Src: EDB
  - Language Preference: English (dropdown)
  - Media Preference: Large Print Handbook (dropdown)
- Buttons:** BACK, Update, Cancel, and Print Screen.
- Footer:** DATABASE: HCFADB1T, DATE: 06/17/2003, TIME: 15:30:24

**Table 11: Beneficiary  
Communication Profile  
Window Information**

<b>Beneficiary Communication Profile Window Information</b>	
<b>Fields</b>	<b>Description</b>
Telephone Number	Telephone number of the beneficiary.
Fax Number	Fax telephone number of the beneficiary.
E-mail Address	E-mail address of the beneficiary.
EFT Address	Electronic Funds Transfer (EFT) address of the beneficiary.
Language Preference	Requested language for correspondence.  Drop-down menu choices are English and Spanish.
Media Preference	Requested form for correspondence.  Drop-down menu choices are Written, Audio, Spoken, and Braille.
<b>Fields</b>	<b>Description</b>
Src	Source feed for the language preference.  Values are EDB and CSR.
Survey/Sample Cumulative Total	Total of all surveys and samples in which beneficiary has participated.
Survey/Sample Participation Indicator	Indicates whether a beneficiary has elected to participate in a survey or sample.
<b>Medicare Handbook Information</b>	
Correspondence Type	Handbook
Language Preference	Requested language for the handbook.  Drop-down menu choices are English and Spanish.

Beneficiary Communication Profile Window Information	
Media Preference	Requested form for the handbook – or – suppress the mailing.  Values are Audio, Braille, Handbook, Large Print Handbook, and Suppress Mailing.
Src	Source feed for the language preference.  EDB    Enrollment Database CSR    Customer Service Representative
Buttons	Description
Back	Returns to Bene Profile tab.
Update	<b>This button is grayed out in Inquiry mode.</b>
Cancel	<b>This button is grayed out in Inquiry mode.</b>
Print Screen	Prints the current screen.

## Instructions

*To view* a beneficiary's communication profile:

- On the Bene Profile tab, click the **Bene Communication** button.

The Beneficiary Communication Profile window displays.

*To exit* from this window:

- Click the **BACK** button located at the bottom left-hand side of the window.

The Bene Profile tab displays.

## Viewing Rep Payee Communication Information

### Purpose

The Rep Payee Communication Profile window (Figure 21) provides contact information and information about the choices a representative payee has made regarding the reception of correspondence and the Medicare Handbook.

*For the steps to follow to view this window, see **Instructions** (on page 50).*

See Table 12 for a complete description of all the fields contained in this window.

**Figure 21:**  
**Representative Payee Communication Profile Window**

**Beneficiary Data**

Beneficiary Profile | Entitlement | Coverage | Medicaid | **Inquiry**

HICN 111-11-1111A SSN .. Sex F Src CWF Date of Birth 06/10/1920

Name Last MOUSE First MICKEY MI M Src EDB

**Rep Payee Communication Profile**

Rep Payee Name DONALD DUCK

Telephone Number 410-555-7778 E-Mail Address DONALD.DUCK@DISNEY.COM

Fax Number 410-111-3333 EFT Address

Language Preference Spanish Src CSR

Media Preference Braille

Survey/Sample Cumulative Total

Survey/Sample Participation Indicator ☒ Yes ☐ No

**Medicare Handbook Information**

Correspondence Type Handbook Src

Language Preference English

Media Preference Handbook

BACK Update Cancel Print Screen

DATABASE: HCFAD/81T DATE: 05/15/2003 TIME: 15:00:15



**Table 12: Rep Payee  
Communication Profile  
Window Information**

<b>Rep Payee Communication Profile Window Information</b>	
<b>Fields</b>	<b>Description</b>
Rep Payee	Name of the beneficiary's representative payee.
Telephone Number	Telephone number of the beneficiary's representative payee.
Fax Number	Fax telephone number for the beneficiary's representative payee.
E-mail Address	E-mail address of the beneficiary's representative payee.
EFT Address	EFT address of the beneficiary's representative payee.
Language Preference	Language requested for beneficiary's representative payee notices.  Values are English and Spanish.
Media Preference	Requested form for correspondence.  Values are Written, Audio and Braille.
Src	Indicates the source (CSR) for the representative payee language preference.
Survey/Sample Cumulative Total	Total of all surveys and samples in which a beneficiary's representative payee has participated.
Survey/Sample Participation Indicator	Indicates whether or not a beneficiary's representative payee has elected to participate in surveys or samples.
<b>Medicare Handbook Information</b>	
Correspondence Type	Handbook
Language Preference	Requested language for the handbook.  Values are English and Spanish.

Rep Payee Communication Profile Window Information	
Media Preference	Requested form for the handbook – or – suppress the mailing.  Values are Audio, Braille, Handbook, Large Print Handbook, and Suppress Mailing.
Src	Source feed for the language preference.
Buttons	Description
Back	Returns to the Bene Profile tab.
Update	<b>This button is grayed out in Inquiry mode.</b>
Cancel	<b>This button is grayed out in Inquiry mode.</b>
Print	Prints the current screen.

## Instructions

*To view* a representative payee's communication profile:

- On the Bene Profile tab, click the **Rep-Payee Comm** button.

**Note:** This button will be disabled if there is no representative payee for the beneficiary.

The Rep Payee Communication Profile window displays (see Figure 21).

*To exit* from this window:

- Click on the **BACK** button located at the bottom of the window.

The Bene Profile tab displays.

## Viewing Miscellaneous Information

### Purpose

The Miscellaneous Beneficiary Information window (Figure 22) provides additional miscellaneous beneficiary information such as Last Card Request Date and SSA Benefit Payment Status Code.

For the steps to follow to view this window, see **Instructions** (on page 53).

See Table 13 for a description of the fields on this window.

**Figure 22:**  
**Miscellaneous**  
**Beneficiary Information**  
**Window**

The screenshot shows a software window titled "Beneficiary Data" with a tabbed interface. The "Miscellaneous Beneficiary Information" tab is selected. The window contains several input fields for beneficiary data, including HICN, SSN, Sex, Date of Birth, Name (Last, First, MI), and various dates and codes. At the bottom, there are buttons for "BACK", "Incarceration Status", "Not Lawful U.S. Presence", and "Print Screen".

Field	Value
HICN	123-45-6789A
SSN	123-45-6789
Sex	F
Src	EDB
Date of Birth	08/03/1915
Name Last	MOUSE
Name First	MINNIE
MI	M
Src	EDB
Last Health Insurance Card Request Date	
MBD Accretion Date	07/25/2001
Date of Last EDB Update	01/10/2000
Program Service Center (PSC) Code	7
CWF Host Site	B
SSA Benefit Payment Status Code	C
Medicare Qualified Govt Employee (MQGE) Code	
Combined US Foreign Earning Switch	<input type="radio"/> Yes <input checked="" type="radio"/> No

Buttons: BACK, Incarceration Status, Not Lawful U.S. Presence, Print Screen

Footer: DATABASE: HCFAD81V DATE: 03/05/2002 TIME: 15:52:56

**Table 13: Miscellaneous  
Beneficiary Information  
Window**

Miscellaneous Beneficiary Information Window	
Fields	Description
Last Health Insurance Card Request Date	Last date a Medicare card was requested, because of either clerical request or change in Medicare entitlement that required that a new card be issued.
MBD Accretion Date	Date the beneficiary's record was added to the MBD database.
Date of Last EDB Update	Date of the last EDB update for this beneficiary.
SSA Benefit Payment Status Code	SSA Benefit Payment Status code.  <b>Right-click</b> in this field to see a list of the codes and descriptions.
Medicare Qualified Govt Employee (MQGE) Code	Status of a current or retired government employee who is currently entitled to Medicare coverage.
Combined US Foreign Earning Switch	Indicates whether a Medicare beneficiary's earnings from a foreign country, with which the US has an agreement, have been combined with earnings from the US to establish eligibility for benefits.
Program Service Center (PSC) Code	Program Service Center where a beneficiary's social security claim account folder is maintained.  <b>Right-click</b> in this field to see a list of the codes and descriptions.
CWF Host Site	Common Working File (CWF) location where a beneficiary's Medicare utilization records are maintained.  <b>Right-click</b> in this field to see a list of the codes and descriptions.
Buttons	Description
Back	Returns to the Bene Profile tab.

Miscellaneous Beneficiary Information Window	
Fields	Description
Incarceration Status	Displays the Incarceration Status Pop-up window.
Not Lawful U.S. Presence	Displays the Not Lawful U.S. Presence Pop-up window
Button	Description
Print Screen	Prints the current screen.

### **Instructions**

*To view* miscellaneous beneficiary information:

- On the Bene Profile tab, click the **Misc** button located  
  
The Miscellaneous Beneficiary Information window displays (see Figure 22).

*To exit* from this window:

- Click the **BACK** button located at the bottom left-hand side of the window.

The Bene Profile tab displays.

## Viewing Incarceration Status Information

### Purpose

The Incarceration Status window (Figure 23) contains information about a beneficiary's incarceration status.

For the steps to follow to view this window, see **Instructions** (on page 55).

Table 14 describes the Incarceration Status window fields.

**Figure 23: Incarceration Status Window**

The screenshot displays the 'Beneficiary Data' window with several tabs: 'Bene Profile', 'Entitlement', 'Coverage', and 'Medicaid'. The 'Bene Profile' tab is active, showing fields for HICN (123-45-6789A), SSN (123-45-6789), Sex (F), Src (EDB), Date of Birth (08/03/1915), and Name (Last: MOUSE, First: MINNIE, MI: M, Src: EDB). Below these fields is the section 'Miscellaneous Beneficiary Information'. A sub-window titled 'Incarceration Status' is open, showing 'Effective Date' as 01/01/2002 and 'Termination Date' as empty. The sub-window has 'OK' and 'Print' buttons. At the bottom of the main window are buttons for 'BACK', 'Incarceration Status', 'Not Lawful U.S. Presence', and 'Print Screen'. The status bar at the bottom indicates 'DATABASE: HCFAD81V', 'DATE: 09/06/2002', and 'TIME: 10:10:54'.

**Table 14: Incarceration  
Status Window  
Information**

Incarceration Status Window Information	
Fields	Description
Effective Date	Start date of the beneficiary's incarceration.
Termination Date	End date of the beneficiary's incarceration.
Buttons	Description
OK	Returns to the Miscellaneous Beneficiary Information window.
Print	Prints the current screen.

**Instructions**

*To view* the incarceration status of a beneficiary:

- On the Miscellaneous Beneficiary Information window, click the **Incarceration Status** button located at the bottom.

The Incarceration Status window displays with any relevant beneficiary information.

*To exit* from this window:

- Click the **OK** button.

The Miscellaneous Beneficiary Information window displays.

**Viewing Not Lawful  
US Presence  
Information**  
**Purpose**

The Not Lawful US Presence window (Figure 24) contains information to indicate whether a beneficiary is in the US unlawfully.

*For the steps to follow to view this window, see **Instructions** on page 57).*

See Table 15 for a complete description of the fields on this window.

**Figure 24: Not Lawful  
U.S. Presence Pop-up  
Window**

The screenshot shows a software interface with a main window and a pop-up window. The main window has tabs for 'Bene Profile', 'Entitlement', 'Coverage', and 'Medicaid'. It displays beneficiary information: HICN 123-45-6789A, SSN 123-45-6789, Sex F, Src EDB, Date of Birth 08/03/1915, Name Last MOUSE, First MINNIE, MI M, Src EDB. Below this is a section titled 'Miscellaneous Beneficiary Information' with fields for 'Last Health Insurance Card Request', 'MBD Accretion Date', 'Date of Last EDB Update', 'SSA Benefit Payment Status Code', 'Medicare Qualified Govt Employee', and 'Combined US Foreign Earning Swit'. There are also buttons for 'BACK', 'Incarceration Status', 'Not Lawful U.S. Presence', and 'Print Screen'. The pop-up window, titled 'Beneficiary Data', has a title bar and a close button. It displays 'Not Lawful U.S. Presence' in large text. Below this, it shows 'Effective Date' as 02/01/1997 and 'Termination Date' as 05/31/1999. At the bottom of the pop-up are 'Ok' and 'Print' buttons. The status bar at the bottom of the main window shows 'DATABASE: HCFAD8TV', 'DATE: 03/06/2002', and 'TIME: 12:57:47'.



**Table 15: Not Lawful  
US Presence Window  
Descriptions**

Not Lawful US Presence Window Descriptions	
Fields	Description
Effective Date	Start date of the beneficiary's Not Lawful US presence.
Termination Date	End date of the beneficiary's Not Lawful US presence.
Buttons	Description
OK	Returns to the Miscellaneous Beneficiary Information window.
Print	Prints the current screen.

**Instructions**

*To view* information about a beneficiary's not lawful US presence:

- On the Miscellaneous Beneficiary Information window, click the **Not Lawful US Presence** button at the bottom.

**Note:** If there are no entries in the Not Lawful US Presence window, the button will appear grayed out.

Information appears in the pop-up window (see Figure 24).

*To exit* from this window:

- Click the **OK** button.

The Miscellaneous Beneficiary Information window displays.

## Viewing Batch Exceptions Information

### Purpose

The Batch Exceptions window (Figure 25) contains a beneficiary's batch exceptions information.

For the steps to follow to view this window, see **Instructions** (on page 59).

See Table 16 for a complete description of the fields on this window.

**Figure 25: Batch Exceptions Window**

**BATCH Exceptions**

HICN 725-03-2933A Last Name NATALIE First Name JOSEPH MI A

Part A: Start 11/01/1993 Term Part B: Start 02/01/1996 Term

Exception Date	Excpn Code	Source	Exception Description
10/31/2002	E00029	EDB	CANNOT ADD - BENE ALREADY ON FILE
10/31/2002	E00029	EDB	CANNOT ADD - BENE ALREADY ON FILE
10/31/2002	E00029	EDB	CANNOT ADD - BENE ALREADY ON FILE
10/31/2002	E00029	EDB	CANNOT ADD - BENE ALREADY ON FILE
10/29/2002	E00029	EDB	CANNOT ADD - BENE ALREADY ON FILE
10/29/2002	E00029	EDB	CANNOT ADD - BENE ALREADY ON FILE
10/29/2002	E00029	EDB	CANNOT ADD - BENE ALREADY ON FILE
10/29/2002	E00029	EDB	CANNOT ADD - BENE ALREADY ON FILE
10/29/2002	E00029	EDB	CANNOT ADD - BENE ALREADY ON FILE
10/28/2002	E00029	EDB	CANNOT ADD - BENE ALREADY ON FILE
///			
///			
///			
///			
///			
///			

BACK Print Screen Total Occurrences 009

DATABASE: HCFADB1T DATE: 11/01/2002 TIME: 22:12:27

Start Project Oct30GUI APP - N... Application Output Beneficiary Data - Pr... 10:12 PM

**Table 16: Batch Exceptions Window Information**

Batch Exceptions Window Information	
Fields	Description
Exception Date	The date exception occurred on.
Exception Code	The exception code for this batch exception.

Batch Exceptions Window Information	
Source	The source for this batch exception.
Exception Description	The description of this batch exception.
Total Occurrences	The total number of batch exceptions occurrences found.
Buttons	Description
BACK	Returns to the Bene Profile tab
Print Screen	Prints the current screen.

### ***Instructions***

*To view a beneficiary's batch Exceptions:*

- On the Bene Profile tab, click the **Batch Exceptions** button located at the bottom.

The Batch Exceptions window displays (Figure 25).

*To exit from this window:*

- Click the **BACK** button.

The display returns to the Bene Profile tab.

## Viewing Entitlement Information

### Purpose

The information contained on the Entitlement tab (Figure 26) provides you with the data necessary to determine a beneficiary's entitlement to Medicare.

*For the steps to follow to view this window, see **Instructions** (on page 62).*

See Table 17 for complete descriptions of all the fields on this tab.

**Figure 26: Entitlement Tab**

Beneficiary Data - Entitlement

Bene Profile Entitlement Coverage Medicaid Inquiry

HICN 123-45-6789A SSN 123-45-6789 Sex F Src EDB Date of Birth 08/03/1915

Name Last MOUSE First MINNIE MI M Src EDB

**Part A Entitlement**

Effective Date	Term Date	Status	Enrollment Reason
01/01/1992		E	I
08/01/1980	12/31/1990	E	I

**Part B Entitlement**

Effective Date	Term Date	Status	Enrollment Reason
08/01/1980		Y	G

EXIT Entitlement Audit History Print Screen

DATABASE: HCFADB1V DATE: 09/05/2002 TIME: 13:51:17

**Table 17: Entitlement  
Tab Information**

<b>Entitlement Tab Information</b>	
<b>Fields</b>	<b>Description</b>
<b>Part A Entitlement</b>	
Effective Date	Medicare Part A entitlement effective date for a beneficiary.
Term Date	Medicare Part A entitlement termination date for a beneficiary.
Status	Medicare Part A entitlement status or non-entitlement reason. <b>Right-click</b> in this field to see a list of the codes and descriptions.
Enrollment Reason	This code is used by SSA to reflect information about a specific Part A enrollment and is based upon equitable relief. <b>Right-click</b> in this field to see a list of the codes and descriptions.
<b>Part B Entitlement</b>	
Effective Date	Medicare Part B entitlement effective date for a beneficiary.
Term Date	Medicare Part B entitlement termination date for a beneficiary.
Status	Represents the Medicare Part B entitlement status or non-entitlement reason. <b>Right-click</b> in this field to see a list of the codes and descriptions.
Enrollment Reason	This code is used by SSA to reflect information about a specific Part B enrollment and is based upon equitable relief. <b>Right-click</b> in this field to see a list of the codes and descriptions.
<b>Buttons</b>	<b>Description</b>
Exit	Exits from the system.
Entitlement Audit History	Displays the Entitlement Audit History window.

Entitlement Tab Information	
Print Screen	Prints the current screen.

## Instructions

To view beneficiary entitlement information:

- Click the **Entitlement tab** (located next to the Bene Profile tab).

**Note:** You must be on a main tab to navigate to a different tab.

To exit from this tab:

- Click another tab.

## Viewing Entitlement Audit History Information

### Purpose

The Entitlement Audit History window (Figure 27) contains a beneficiary's entitlement history information.

For the steps to follow to view this window, see **Instructions** (on page 64).

See Table 18 for a complete description of the fields on this window.

**Figure 27: Entitlement Audit History Window**

Beneficiary Data - Entitlement Audit History

HICN 123-45-6789A

**Part A Entitlement Audit History**

Effective Date	Term Date	Status Code	Enroll Reason	Non-Ent Reason	Start Create Timestamp	Start Src	End Create Timestamp	End Src	Audit Create Timestamp	Audit Src
08/01/1980		E	I		2001-07-25-11.47.06	EDB				

**Part B Entitlement Audit History**

Effective Date	Term Date	Status Code	Enroll Reason	Non-Ent Reason	Start Create Timestamp	Start Src	End Create Timestamp	End Src	Audit Create Timestamp	Audit Src
08/01/1980		Y	G		2001-07-25-11.47.24	EDB				

BACK

Display Options  
☐ All  
☐ Audit Only

Sort Options  
☐ Effective Date  
☐ Process Date

Print Screen

DATABASE: HCFADB1T DATE: 06/18/2003 TIME: 14:32:07

**Table 18: Entitlement  
Audit History Window  
Information**

Entitlement Audit History Window Information	
Fields	Description
HICN	Beneficiary's Health Insurance Claim number, consisting of Claim Account Number (CAN) and Beneficiary Identification Code (BIC).
Effective Date	Medicare Part A or Part B entitlement effective date for a beneficiary.
Term Date	Medicare Part or Part B entitlement termination date for a beneficiary.
Status Code	Medicare Part A or Part B entitlement status for a beneficiary.  <b>Right-click</b> in this field to see a list of the codes and descriptions.
Enroll Reason	Code used by SSA to reflect information about a specific Part A or Part B enrollment and is based upon equitable relief.
Non-Entl Reason	Code used to reflect information about why a beneficiary is not entitled to benefits.  <b>Right-click</b> in this field to see a list of the codes and descriptions.
Start Create Timestamp	Date and time the entitlement period was added.
Start Source (Src)	Source that added the entitlement period.
End Create Timestamp	Date and time the entitlement period was terminated.
End Source (Src)	Source that terminated the entitlement period.
Audit Create Timestamp	Date and time the entitlement period was audited.
Audit Source (Src)	The source that audited the entitlement period.
Radio Buttons	Description
Display Options	

Entitlement Audit History Window Information	
All	All entitlement periods will display – valid and audited.
Audit Only	Only audited entitlement periods will display.
<b>Sort Options</b>	
Effective Date	Sorted in descending effective date order.
Process Date	Sorted in descending process date order.  This is the default.
Buttons	Description
Back	Returns to the Entitlement tab.
Print Screen	Prints the current screen.

### **Instructions**

*To view a beneficiary's entitlement audit history:*

- On the Entitlement tab, click the **Entitlement Audit History** button located at the bottom.

The Entitlement Audit History pop-up window displays (see Figure 27).

*To exit from this window:*

- Click **Back**.

The display returns to the main Entitlement tab.



## Viewing Coverage Information

### Purpose

The Coverage tab (Figure 28) provides information about the Service Delivery elections chosen by a beneficiary and information about other Medicare coverage.

*For the steps to follow to view this window, see **Instructions** (on page 70).*

See Table 19 for a complete description of fields contained in this tab.

**Figure 28: Coverage Tab**

**Beneficiary Data - Coverage**

**Navigation:** Bene Profile | Entitlement | **Coverage** | Medicaid Inquiry

**Beneficiary Information:**  
 HICN: 111-11-1111A | SSN: 111-11-1111 | Sex: M | Src: CWF | Date of Birth: 10/20/1928  
 Name: Last: MOUSE | First: MICKEY | MI: M | Src: EDB

**Coverage**

Beneficiary Service Delivery Elections					Discount Drug Card				
Delivery Option	Contract #	Enrollment Date	Disenrollment Date	Audit Ind	Drug Card Pgm Id	Enrollment Date	Disenrollment Date	TA Effective Date	TA Disenroll Date
HCPP	H4452	01/01/2002		V	D2108 001	07/01/2004		07/01/2004	
					D2108 001	06/01/2004	06/30/2004	06/01/2004	06/30/2004

**Other Coverage**

	Effective Date	Termination Date
Hospice	01/01/2002	
ESRD	01/01/2002	12/31/2002

**Buttons:** EXIT | Other Insurance Profile | Print Screen

**Status Bar:** DATABASE: HCFADB1T | DATE: 05/06/2004 | TIME: 15:14:56

**Table 19: Coverage Tab Information**

Coverage Tab Information											
Fields	Description										
<b>Beneficiary Service Delivery Elections</b>											
Delivery Option	<p>Describes the service delivery election chosen by the beneficiary. If none is chosen, the MBD creates a default Fee-For-Service period. Values are:</p> <table> <tr> <td>HCPP</td><td>Cost/Healthcare Prepayment Plan</td></tr> <tr> <td>CCP</td><td>Coordinated Care Plan</td></tr> <tr> <td>PFFS</td><td>Private Fee-For-Service</td></tr> <tr> <td>Demo</td><td>Demonstration</td></tr> <tr> <td>FFS</td><td>Fee-For-Service</td></tr> </table>	HCPP	Cost/Healthcare Prepayment Plan	CCP	Coordinated Care Plan	PFFS	Private Fee-For-Service	Demo	Demonstration	FFS	Fee-For-Service
HCPP	Cost/Healthcare Prepayment Plan										
CCP	Coordinated Care Plan										
PFFS	Private Fee-For-Service										
Demo	Demonstration										
FFS	Fee-For-Service										
Contract #	Contract number for the plan in which the beneficiary is enrolled.										
Enrollment Date	Date on which the beneficiary enrolled in the plan.										
Disenrollment Date	Date on which the beneficiary disenrolled from a plan.										
Audit Ind	<p>Flag indicating whether the enrollment information is audited.</p> <p>A = Audited    V = Valid</p>										
Audit History?	<p>Radio button defaults to No.</p> <table> <tr> <td>No</td><td>View valid enrollment periods only</td></tr> <tr> <td>Yes</td><td>View current and audited enrollment periods</td></tr> </table> <p>Button is grayed out if there are no audited enrollments.</p>	No	View valid enrollment periods only	Yes	View current and audited enrollment periods						
No	View valid enrollment periods only										
Yes	View current and audited enrollment periods										

Coverage Tab Information	
Fields	Description
<b>Discount Drug Card</b>	
Drug Card Pgm ID	This is a unique identifier for an organization or individual responsible for the local administration of the drug card benefit.
Enrollment Date	The date reflects the effective date of the drug card enrollment.
Disenrollment Date	This date captures the date that the enrollment is terminated.
TA Effective Date	This date reflects the effective date of the Transitional Assistance.
TA Disenroll Date	This date captures the date that the TA enrollment is terminated.
<b>Other Coverage</b>	
<b>Hospice</b>	
Effective Date	Start date of the beneficiary's period of hospice coverage.
Termination Date	Termination date of the beneficiary's period of hospice coverage.
<b>ESRD</b>	
Effective Date	Date on which the beneficiary is entitled to Medicare, in some part, because of a diagnosis of ESRD.
Termination Date	Date on which the beneficiary is no longer entitled to Medicare under ESRD provisions.
Buttons	Description
+ (next to Hospice)	Displays details of the Hospice displayed in the Other Coverage area of this window.  For more information, see Viewing Hospice Detail on page 86.

Coverage Tab Information	
Fields	Description
+ (next to ESRD)	Displays details of the ESRD displayed in the Other Coverage area of this window.  For more information, see <b>Viewing ESRD Detail</b> on page 88.
Exit	Exits from the MBD application.
Other Insurance Profile	Displays the Other Insurance Profile screen.  For more information, see nn.
Print Screen	Prints the current screen.
Coverage Tab Information	
Fields	Description
<b>Beneficiary Service Delivery Elections</b>	
Delivery Option	Describes the service delivery election chosen by the beneficiary. If none is chosen, the MBD creates a default Fee-For-Service period. Values are:  <div style="display: flex; justify-content: space-between; padding: 0 20px;"> <span>HCPP</span><span>Cost/Healthcare Prepayment Plan</span> </div> <div style="display: flex; justify-content: space-between; padding: 0 20px;"> <span>CCP</span><span>Coordinated Care Plan</span> </div> <div style="display: flex; justify-content: space-between; padding: 0 20px;"> <span>PFFS</span><span>Private Fee-For-Service</span> </div> <div style="display: flex; justify-content: space-between; padding: 0 20px;"> <span>Demo</span><span>Demonstration</span> </div> <div style="display: flex; justify-content: space-between; padding: 0 20px;"> <span>FFS</span><span>Fee-For-Service</span> </div>
Contract #	The contract number for the plan in which the beneficiary is enrolled.
Enrollment Date	The date on which the beneficiary enrolled in the plan.
Disenrollment Date	The date on which the beneficiary dis-enrolled from a plan.

Coverage Tab Information	
Fields	Description
Audit Ind	Indicates whether the Group Health Plan (GHP) Medicaid information is audited. Values are:  A Audited  V Valid
Radio Button	Description
Audit History?	Radio button defaults to No. The values are:  No View valid enrollment periods only  Yes View current and audited enrollment periods  Button is grayed out if there are no audited enrollments.
<b>Other Coverage</b>	
<b>Hospice</b>	
Effective Date	Elected start date of the beneficiary's period of hospice coverage.
Termination Date	Termination date of the beneficiary's period of hospice coverage.
<b>ESRD</b>	
Effective Date	Date on which the beneficiary is entitled to Medicare, in some part, because of a diagnosis of ESRD.
Termination Date	Date on which the beneficiary is no longer entitled to Medicare under ESRD provisions.
Buttons	Description
+	Displays details when a Beneficiary Delivery Option is selected.  For more information, see <b>Viewing Beneficiary Service Delivery Elections Detail Windows</b> (on page 75).

Coverage Tab Information	
Fields	Description
+ (next to Hospice)	Displays details of the Hospice displayed in the Other Coverage area of this window.  For more information, see <b>Viewing Hospice Detail</b> (on page 86).
+ (next to ESRD)	Displays details of the ESRD displayed in the Other Coverage area of this window.  For more information, see <b>Viewing ESRD Detail</b> (on page 88).
Exit	Exits from the MBD application.
Other Insurance Profile	Displays the Other Insurance Profile window.
Print Screen	Prints the current screen.

## Instructions

*To view* beneficiary coverage information:

- Click the Coverage tab, which is located next to the Entitlement tab (see Figure 28).

*To exit* from this window:

- Click the **OK** button.

The display returns to the Coverage tab.

**Note:** You must be on a main tab to navigate to a different tab.

## Viewing Drug Card Enrollment Detail

### Purpose

The Coverage window enables you to view a detail window for viewing specific Drug Card Enrollments for a specific beneficiary. This detail window provides information on specific drug cards and transitional assistance for the beneficiary.

To display this detail window, move the cursor to the Discount Drug box on the Coverage tab window. Highlight and click to select an enrollment and click on the Detail button (+). The Drug Enrollment Detail window is displayed.

Figure 29 shows the Drug Card Enrollment detail window.

Refer to Table 20 for the descriptions of the fields and buttons on the detail window.

**Figure 29: Drug Card Enrollment Detail**

**Table 20: Drug Card Enrollment Detail Information**

Drug Card Enrollment Detail	
Fields	Description
<b>Drug Card Information</b>	
Drug Card ID	Drug card program identification number.
Processed Date	Date the beneficiary's enrollment or disenrollment was processed.
Enrollment Effective Date	Date on which beneficiary's enrollment became effective.

Drug Card Enrollment Detail	
Fields	Description
Enroll Rsn Cd	Code that indicates the reason for the beneficiary's current enrollment status.
Disenrollment Effective Date	Date beneficiary was disenrolled.
Disenrol Rsn Cd	Code that indicates the reason the beneficiary disenrolled.
Sp Elec Sw	Indicates whether or not the beneficiary's termination will allow him to reenroll in the drug card program outside of the open enrollment period.
<b>Transitional Assistance</b>	
Effective Date	Date the beneficiary's transitional assistance became effective.
Processed date	Date the beneficiary's enrollment or disenrollment was processed.
Proration Date	Proration date for transitional assistance.
Disenrollment Effective date	Date beneficiary was disenrolled.
Disenrl Rsn Cd	Code that indicates the reason the beneficiary disenrolled.
Buttons	Description
Back	Returns to the Coverage window.
Return to Bene Profile	Displays a blank Beneficiary profile screen.
Disenroll	Displays the Drug Card Disenrollment window. This button is grayed out unless the user is authorized for the disenrollment function.
Print Screen	Prints the current screen.



## Viewing the Drug Card Disenrollment Window

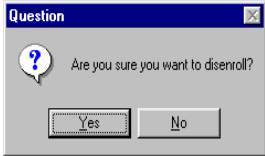
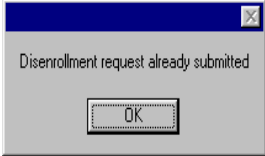
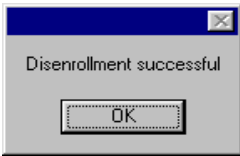
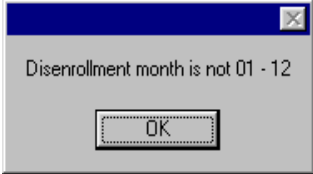
The Drug Card disenrollment window allows you to disenroll a beneficiary from the Drug Card program. Figure 30 shows the window. Table 21 describes the fields in the window and the user prompts that are displayed when the Submit button is pressed.

**Figure 30: The Drug  
Card Disenrollment  
Window**



**Table 21: Drug Card  
Disenrollment Window  
Information**

Drug Card Disenrollment Window	
Fields	Description
Drug Card ID	Drug card program identification number.
Enrollment date	Date beneficiary was enrolled.
Disenrollment Date	Date the beneficiary was disenrolled.
Disenrollment Reason	Text that indicates the reason the beneficiary disenrolled.

Drug Card Disenrollment Window	
Fields	Description
Buttons	Description
SUBMIT	Submits the record to the database.
CANCEL	Cancels the disenrollment process.
Print	Prints the current screen.
Drug Card Disenrollment Prompts	
	A check to verify that the beneficiary is to be disenrolled.
	Prompt that indicates a disenrollment form has previously been submitted for the beneficiary.
	Message that indicates the disenrollment of the beneficiary was successfully submitted for processing.
	Prompt to indicate that the month date that was entered was not between 01 through 12 as required. Re-enter the correct month date.

**Viewing Beneficiary  
Service Delivery  
Elections Detail  
Windows**

**Purpose**

Detail windows are available for the current managed care elections:

- **CCP**: Coordinated Care Plans
- **Cost/HCPP**: Healthcare Prepayment Plans
- **PFFS**: Private Fee-For-Service Plans
- **Demo**: CMS Demonstrations

Each detail window contains information for each different option, including the enrollment and dis-enrollment dates and reason. Each detail window also provides access to contract information.

*For the steps to follow to view this window, see **Instructions** (on page 79).*

See Table 22 for a complete description of all the fields contained on all of the detail windows, including the sample CCP Detail window (Figure 31 on page 79).

**Table 22: Service  
Delivery Election Detail  
Field Descriptions**

Service Delivery Election Detail Windows Information	
Fields	Description
Contract Number	Unique number used to identify the contract.
Contract Type (Cost/HCPP and CCP only)	<p>Type of contract.</p> <p>HMO    Health Maintenance Organization</p> <p>PSOL   Provider Service Organization (Licensed)</p> <p>PSOW   Provider Service Organization (Waiver)</p> <p>RFB    Religious and Fraternal Benefit Plans</p> <p>PPO    Preferred Provider Organization</p> <p>RISK   Risk</p> <p>HCPP   Healthcare Prepayment Plan</p> <p>COST   Cost</p>
Enrollment Date	Date that a beneficiary enrolled in the CCP.
Disenrollment Date	Date the beneficiary dis-enrolled from the CCP.

Service Delivery Election Detail Windows Information	
Disenrollment Reason	Reason why a beneficiary dis-enrolled from the CCP.  <b>Right-click</b> in this field to see a list of the codes and descriptions.
Prior Cmc1 Mbr Mths ( <i>CCP only</i> )	Number of months a beneficiary was enrolled in a given MCO on a commercial basis, prior to the MCO's Medicare contract.
Audit Ind	Flag indicating whether the enrollment period is audited.  A      Audited  V      Valid
Signature Date	Date the enrollment application was signed.
Start Create Timestamp	Date and time the enrollment period was added in the GHP.
Strt Src	Source that added the enrollment period.
End Create Timestamp	Date and time the enrollment period was terminated in the GHP.
End Src	Source that terminated the enrollment period.
Audit Create Timestamp	Date and time the enrollment period was audited in the GHP.
Audit Src	Source that audited the enrollment period.
PBP (Plan Benefit Package) Information	
PBP ID	PBP identifier.
PBP Start Date	Date PBP election started.
PBP End Date	Date PBP election ended.
Aud Ind	Indicates whether the PBP period is audited or valid.  A      Audited  V      Valid.
App Signature Date	Application signature date.

Service Delivery Election Detail Windows Information	
Premium Reduction Ind	Indicates whether the beneficiary has a reduced Part B premium.  Y Yes N No.
Start Create Timestamp	Date and time the PBP period was added in the GHP.
Strt Src	Source that added the PBP period.
End Create Timestamp	Date and time the PBP period was terminated in the GHP.
End Src	Source that terminated the PBP period.
Audit Create Timestamp	Date and time the PBP period was audited in the GHP.
Audit Src	Source that audited the PBP period.
Buttons	Description
BACK	Returns to the Coverage tab.
Return to Bene Profile	Returns to a cleared Bene Profile tab.
Audit History?	Displays audited PBP periods when set to Yes.  For audited enrollments, defaults to Yes. For valid enrollments, defaults to No.  Button is grayed out if there are no audited PBP periods.
Contract Information	Displays the Contract Information window.  For more information, see <b>Viewing Contract Information for a Service Delivery Election</b> (on page 80).
Managed Care Institutional Status	Displays the Managed Care Institutional Status window.  For more information, see <b>Viewing Managed Care Institutional Status Information</b> (on page 82).
Print Screen	Prints the current screen.

## Instructions

To view the detail window for an election:

- Highlight the desired election.
- Click the **+** button (detailed information) located next to the Beneficiary Service Delivery Elections group box.

The detail window displays for the election.

Figure 31 shows the CCP Detail window. All of the detail windows are similar to this example and include both CCP and PBP information

To exit from the detail window:

- Click the **BACK** button located at the bottom of the window to return to the main Coverage tab.

or

- Click the **Return to Bene Profile** button located at the bottom of the window to return to a cleared Bene Profile tab.

**Figure 31: CCP Detail Window**

The screenshot shows a software window titled "Beneficiary Data - Coverage Detail". It has tabs for "Bene Profile", "Entitlement", "Coverage", and "Medicaid", with "Coverage" currently selected. An "Inquiry" button is in the top right. Below the tabs, there are input fields for beneficiary information: HICN (123-45-6789A), SSN (123-45-6789), Sex (F), Src (EDB), Date of Birth (08/03/1915), Last Name (MOUSE), First Name (MINNIE), MI (M), and Src (EDB). Below this is the "CCP Detail" section with fields for Contract Number (H4452), Enrollment Date (03/01/1998), Disenrollment Date (07/31/1999), Disenrollment Reason (12), Audit Ind (checked), Signature Date, and Prior Cml Mbr Mths (00). It also includes Contract Type (HMO), Start Create Timestamp (1998-02-25-12.00.31), End Create Timestamp (1999-07-15-14.31.29), and Audit Create Timestamp. Below that is the "PBP Information" section with a table of PBP data. At the bottom, there are buttons for "BACK", "Return to Bene Profile", "Audit History?" (with Yes/No radio buttons), "Contract Info", "MCO Institutional Status", and "Print Screen". The status bar at the very bottom shows "DATABASE: HCFAD81T", "DATE: 03/18/2003", and "TIME: 10:48:31".

PBP ID	PBP Start Date	PBP End Date	Aud Ind	App Signature Reduction Ind	Premium Ind	Start Create Timestamp	Strt Src	End Create Timestamp	End Src	Audit Create Timestamp	Audit Src
123	06/01/2002		V			2002-05-22-11.51.02	X111				

## Viewing Contract Information for a Service Delivery Election

### Purpose

You can view details about the contract for a beneficiary service delivery election on the pop-up Contract Information window (Figure 32).

*For the steps to follow to view the contract information, see **Instructions** (on page 81).*

**Figure 32: Contract Information Window**

Contract Type Start Dt	Contract Type End Dt	Pay Bill Option Code	Pay Bill Option Description	Bill Option Code	Bill Option Description
07/01/2000		20	PFFS	C	RISK

OK Print

**Table 23: Contract Information Pop-up Window Information**

Contract Information Pop-up Window Information	
Fields	Description
Contract Type Start Dt	Date that the payment bill option becomes effective.
Contract Type End Dt	Date that the payment bill option ends.



Contract Information Pop-up Window Information	
<b>Pay Bill Option:</b>	
Code/Description	Payment bill option codes and descriptions.  <b>Right-click</b> in this field to see a list of the codes and descriptions.
<b>Bill Option Code:</b>	
Code/Description	Bill option codes and descriptions.  <b>Right-click</b> in this field to see a list of the codes and descriptions.
Buttons	Description
OK	Returns the display to the detail window.
Print	Prints the pop-up window.

## Instructions

*To view contract details:*

- On the detail window, click **Contract Information**. (To see a sample detail window for CCP, see Figure 31.)

The Contract Information pop-up window displays (see Figure 32).

*To exit from the pop-up window:*

- Click **OK**.

The detail window displays.

## Viewing Managed Care Institutional Status Information

### Purpose

The Managed Care Institutional Status window (Figure 33) provides information about the current and historical periods of time a beneficiary has qualified for nursing home care and/or has received inpatient care at a medical treatment facility.

*For the steps to follow to view this window, see **Instructions** (on page 85).*

See Table 24 for complete descriptions of fields contained on this window.

**Figure 33: Managed Care Institutional Status Information Window**

Beneficiary Data - Managed Care Institutional Status

Bene Profile Entitlement Coverage Medicaid Inquiry

HICN 123-45-6789A SSN 123-45-6789 Sex F Src EDB Date of Birth 08/03/1915

Name Last MOUSE First MINNIE MI M Src EDB

### Managed Care Institutional Status Information

#### MCO Nursing Home Certifiable

Effective Date	Term Date	Audit Ind	Start Create Timestamp	Start Src	End Create Timestamp	End Src	Audit Create Timestamp	Audit Src
11/01/2001		V	2001-11-06-11.51.33	C111				

#### MCO Institutional Status

Effective Date	Term Date	Audit Ind	Start Create Timestamp	Start Src	End Create Timestamp	End Src	Audit Create Timestamp	Audit Src
02/01/1999	08/31/2000	V	1999-01-25-15.58.35	C111	2000-09-01-00.00.00	C222		

BACK Return to Bene Profile Audit History? ☐ Yes ☒ No Print Screen

DATABASE: HCFAD81T DATE: 09/18/2003 TIME: 10:49:05

**Table 24: Managed  
Care Institutional  
Window Information**

<b>Managed Care Institutional Window Information</b>	
<b>Fields</b>	<b>Description</b>
<b>MCO Nursing Home Certifiable</b>	
Effective Date	The date the beneficiary's health status would warrant nursing home inpatient care, but the beneficiary chose to remain in a non-institutional residence.
Termination Date	The last date that the beneficiary's health status would warrant nursing home inpatient care, after which rectification will be required.
Audit Ind	Indicates whether the Nursing Home Certifiable period is audited. Values are:  A Audited  V Valid
Start Create Timestamp	Date and time the nursing home certifiable period was added in the GHP.
Start Source (Src)	Source that added the nursing home certifiable period.
End Create Timestamp	Date and time the nursing home certifiable period was terminated in the GHP.
End Source (Src)	Source that terminated the nursing home certifiable period.
Audit Create Timestamp	Date and time the nursing home certifiable period was audited in the GHP.
Audit Source (Src)	Source that audited the nursing home certifiable period.
<b>MCO Institutional Status</b>	
Effective Date	Date that the beneficiary became an inpatient resident in a medical treatment facility.

Managed Care Institutional Window Information	
Termination Date	Date beneficiary no longer qualifies to receive benefits for inpatient residence status in a medical treatment facility, or beneficiary is no longer a resident in an inpatient treatment facility.
Audit Ind	Indicates whether the MCO Institutional period is audited. Values are:  A Audited  V Valid
Start Create Timestamp	Date and time the status period was added in the GHP.
Start Source (Src)	Source that added the status period.
End Create Timestamp	Date and time the status period was terminated in the GHP.
End Source (Src)	Source that terminated the status period.
Audit Create Timestamp	Date and time the status period was audited in the GHP.
Audit Source (Src)	The source that audited the status period.
Button	Description
Back	Returns to the Service Delivery Detail window.
Return to Bene Profile	Returns to a cleared Bene Profile tab.
Audit History?	Radio button defaults to No. The values are:  No View valid Institutional and Nursing Home Certifiable periods only  Yes View current and audited Institutional and Nursing Home Certifiable periods.  Button is grayed out if there are no audited periods.
Print Screen	Prints the current screen.

## ***Instructions***

*To view a beneficiary's Managed Care Institutional Status information:*

- Click the **Managed Care Institutional Status** button located at the bottom of the Service Delivery Detail window (To view a sample window, see Figure 27).

*To exit from this window:*

- Click the **BACK** button located at the bottom of the window.
- The Coverage tab displays.

## Viewing Hospice Detail

### Purpose

The Hospice Detail window (Figure 34) displays current and historical hospice periods for a beneficiary.

For the steps to follow to view this window, see **Instructions** (on page 87).

See Table 25 for a complete description of the fields and buttons contained in this window.

**Figure 34: Hospice Detail Window**

Beneficiary Data - Coverage

Beneficiary Data - Hospice

Bene Profile Entitlement Coverage Medicaid

HICN 123-45-6789A SSN 123-45-6789 Sex F Src EDB Date of Birth 08/03/1915

Name Last MOUSE First MINNIE MI M Src EDB

**Hospice Detail**

Effective Date	Termination Date
07/23/2000	08/21/2000
04/24/2000	07/22/2000
01/25/2000	04/23/2000

BACK Return to Bene Profile Print Screen

DATABASE: HCFADB1T DATE: 10/30/2002 TIME: 23:37:02

Start MEDICARE Beneficiary D... Project Oct25GUI.APP - N... Beneficiary Data - Co... 11:37 PM

**Table 25: Hospice Detail  
Window Information**

Hospice Detail Window Information	
Fields	Description
Effective Date	Elected start date of the beneficiary's period of hospice coverage.
Termination Date	Termination date of the beneficiary's period of hospice coverage.
Buttons	Description
Back	Returns to the Coverage tab.
Return to Bene Profile	Returns to a cleared Bene Profile tab.
Print Screen	Prints the current screen.

***Instructions***

To view all hospice periods for a beneficiary:

- On the Coverage tab, click the **+** button (detail information) to the right of the current hospice period.

The Hospice Detail window appears with all the relevant information (see Figure 34).

To exit from this window:

- Click the **BACK** button. The Coverage tab displays.

## Viewing ESRD Detail

### Purpose

The ESRD Detail Information window (Figure 35) displays current and historical periods of ESRD coverage.

For the steps to follow to view this window, see **Instructions** (on page 90).

See Table 26 for a complete description of the fields contained in this window.

**Figure 35: ESRD Detail Information Window**

**Table 26: ESRD Detail Window Information**

Fields	Description
Coverage Effective Date	Date on which the beneficiary is entitled to Medicare, in some part, because of a diagnosis of ESRD.
Coverage Term Date	Date on which the beneficiary is no longer entitled to Medicare under ESRD provisions.
Start Source Cd	Source of the information that establishes Medicare-based ESRD coverage.



Fields	Description
Termination Reason	Reason for Medicare-based ESRD coverage termination.  A      Month of transplant + 36 months B      Last month of chronic dialysis C      Part A termination D      Death E      ESRD ended: other verified source
Dialysis Effective Date	Date the ESRD Dialysis started.
Dialysis Term Date	Date the ESRD Dialysis ended.
Self-Care Training Date	Date the first instance of ESRD self-care training occurred.
Transplant Effective Date	Date the kidney transplant operation occurred.
Transplant Fail Date	Date the kidney transplant operation failed.
Buttons	Description
Back	Returns to the ESRD Detail window.
Return to Bene Profile	Returns to a cleared Bene Profile tab.
Print Screen	Prints the current screen.

## ***Instructions***

*To view* current and historical periods of ESRD coverage:

- On the Coverage tab, click the **+ button** next to the current ESR.

The ESRD Detail window appears (Figure 35).

*To exit* from this window:

- Click the **BACK button** on the bottom of the window.

The Coverage tab displays.

## Viewing Other Insurance Profile Information

### Purpose

The Other Insurance window (Figure 34) displays Medicare Secondary Payer (MSP) Working Aged information.

For the steps to follow to view this window, see **Instructions** (on page 92).

See Table 24 for a complete description of the fields contained in this window.

**Figure 36: Other Insurance Profile Window**

Beneficiary Data - Other Insurance Profile

Bene Profile Entitlement Coverage Medicaid

HICN 123-45-6789A SSN 123-45-6789 Sex F Src EDB Date of Birth 08/03/1915

Name Last MOUSE First MINNIE MI M Src EDB

**Other Insurance Profile**

Effective Date	Termination Date	Primary Insurance Type	MSP Source Cd
02/01/1996	01/31/1997	A	55555
02/01/1997	03/31/1998	A	55555

BACK Return to Bene Profile Print Screen

DATABASE: HCFAD81T DATE: 06/06/2003 TIME: 15:12:42

**Table 27: Other Insurance Profile Window Information**

Other Insurance Profile Window Information	
Fields	Description
Effective Date	The date on which the beneficiary's Working Aged coverage begins.
Termination Date	The date on which the beneficiary's Working Aged coverage is terminated.
Primary Insurance Type	Code to indicate the type of primary insurance. <b>Right-click</b> in this field to see a list of the codes and descriptions.
MSP Source Cd	Contractor number to identify the source of the Working Aged coverage.
Buttons	Description
Back	Returns to the Coverage tab.
Return to Bene Profile	Returns to the a cleared Bene Profile tab.
Print Screen	Prints the current screen.

### **Instructions**

*To view* a beneficiary's Other Insurance Profile information:

- On the Coverage tab, click the **Other Insurance Profile** button.

*To exit* from this window and return to the Coverage tab:

- Click the **BACK** button located at the bottom of the window.

The Coverage tab displays.

## Viewing Medicaid Information

### Purpose

The Medicaid tab (Figure 37) provides a comprehensive profile of both current and historical Medicaid eligibility periods, including GHP, MSIS, and private third-party information.

**Note:** *Currently*, third-party data is not available from the MDB.

*For the steps to follow* to view this window, see **Instructions** (on page 96).

See Table 28 for a complete description of the fields contained in this tab.

**Figure 37: Medicaid Tab**

**Beneficiary Data - Medicaid**

**Medicaid**

HICN 123-45-6789A SSN 123-45-6789 Sex F Src EDB Date of Birth 08/03/1915

Name Last MOUSE First MINNIE MI M Src EDB

**GHP Medicaid Data**

Effective Date	Termination Date	Audit Ind	Start Create Timestamp	Start Src	End Create Timestamp	End Src	Audit Create Timestamp	Audit Src
01/01/2000	01/31/2000	V	2003-07-31-11:58:26		2003-07-31-11:59:48			

Audit History? ☐ Yes ☒ No

**MSIS Medicaid Data**

Fiscal Year	Qtr Num	Days of Eligibility	State Code	Dual Elig Code	Dual Elig Description
		Month 1	Month 2	Month 3	
2003	1	31	30	31	MD 05 QDWI

**Third-Party Medicaid Data**

Mdcr Type Code	Start Date	Term Date	Prem Pyr Code
A	10/01/2001	12/31/2002	001

EXIT Maintenance Assistance Status Basis of Eligibility Print Screen

DATABASE: HCFADB1T DATE: 09/18/2003 TIME: 10:49:54

**Table 28: Medicaid Tab Information**

Medicaid Tab Information	
Fields	Description
<b>GHP Medicaid Data</b>	
Effective Date	Date that the beneficiary's Medicaid eligibility begins.
Termination Date	Date that the beneficiary's Medicaid eligibility was terminated.
Audit Ind	Flag indicating whether the GHP Medicaid period is audited.  A Audited V Valid
Start Create Timestamp	Date and time the Medicaid period was added in the GHP.
Start Source (Src)	Source that added the Medicaid period.
End Create Timestamp	Date and time the Medicaid period was terminated in the GHP.
End Source (Src)	Source that terminated the Medicaid period.
Audit Create Timestamp	Date and time the Medicaid period was audited in the GHP.
Audit Source (Src)	Source that audited the Medicaid period.
Buttons	Description
Audit History?	Radio button defaults to No. The values are:  No View valid Medicaid periods only  Yes View current and audited Medicaid periods.  Button is grayed out if there are no audited periods.

Medicaid Tab Information	
MSIS Medicaid Data	
Fiscal Year	Federal fiscal year that the beneficiary was entitled to Medicaid.
Quarter Number	Federal fiscal quarter that the beneficiary was entitled to Medicaid.
Month 1	Number of days the beneficiary was entitled to Medicaid in the first month of the quarter.
Month 2	Number of days the beneficiary was entitled to Medicaid in the second month of the quarter.
Month 3	Number of days the beneficiary was entitled to Medicaid in the third month of the quarter.
State Code	U.S. Postal Service abbreviation for the state that submitted the Medicaid data.
Dual Elig Code/Dual Elig Description	<p>Indicates coverage for individuals entitled to Medicare and eligible for some category of Medicaid benefits.</p> <p><b>Right-click</b> in this field to see a list of the codes and descriptions.</p>
Third-Party Medicaid Data	
Mdcr Type Code	<p>Medicare type code</p> <p>A Part A third party buy-in.</p> <p>B Part B third party buy-in.</p>
Start Date	Start date of a private third party group's or state's liability for a beneficiary's Part A or Part B premium.
Term Date	Termination date of a private third party group's or state's liability for a beneficiary's Part A or Part B premium.

Medicaid Tab Information	
Prem Pyr Code	<p><b>Part A:</b> Identifier for a third-party agency (either a private group or a state buy-in agency) responsible for paying a beneficiary's Medicare Part A premium.</p> <p><b>Part B:</b> Identifier for a third-party agency (either a private group, state buy-in agency, or Office of Personnel Management (OPM)) responsible for paying a beneficiary's Medicare Part B premium.</p> <p><b>Right-click</b> in this field to see a list of the codes and descriptions.</p>
Buttons	Description
Exit	Exits from the MBD application and displays the MBD Main Menu.
Maintenance Assistance Status	Displays the Maintenance Assistance Status window.
Basis of Eligibility	Displays the Basis of Eligibility window.
Print Screen	Prints the current screen.

## Instructions

*To view Medicaid eligibility information:*

- Click the Medicaid tab, located next to the Coverage tab.

The Medicaid tab appears with all beneficiary information populated in the fields (see Figure 37).

*To open a different tab:*

- Click the tab.

*To return to the Bene Profile tab.*

- Click the **OK** button on the bottom of the window.

The Bene Profile tab displays.



## Viewing Maintenance Assistance Status

### Purpose

The Maintenance Assistance Status window (Figure 38) displays MAS codes and descriptions.

*For the steps to follow to view this window, see **Instructions** (on page 99).*

See Table 29 for a complete description of the fields contained in this window.

**Figure 38: Maintenance Assistance Status Window**

Year	Qtr	Month	State	Code	Description
2001	1	10	MD	2	MEDICALLY NEEDED

OK Print

**Table 29: Maintenance Assistance Status Window Information**

Maintenance Assistance Status Window Information	
Field Name	Description
Year	Federal fiscal year that the beneficiary was entitled to Medicaid.
Qtr	Federal quarter that the beneficiary was entitled to Medicaid.
Month	Month that the code applies to.
State	U.S. Postal Service abbreviation for the state that submitted the Medicaid data.
Code	Beneficiary's maintenance assistance status (MAS).  0      Not Medicaid eligible 1      Cash/Recp/Sect 1931 2      Medically needy 3      Poverty related 4      Other 5      1115 demo 9      Unknown
Description	Short description of the MAS code.
Buttons	Descriptions
OK	Returns to the Medicaid tab.
Print	Prints the current screen.

## ***Instructions***

*To view* the maintenance assistance status information for a beneficiary:

- On the Medicaid tab, click the **Maintenance Assistance Status** button.

The Maintenance Assistance Status window appears with all pertinent beneficiary information populated (see Figure 38).

*To exit* from this window:

- Click the **OK** button.

The main Medicaid tab displays.

## Viewing Basis of Eligibility Information

### Purpose

The Basis of Eligibility window (Figure 39) contains information on how the Medicaid eligibility information was determined.

*For the steps to follow to view this window, see **Instructions** (on page 101).*

See Table 30 for a complete description of the fields contained in this window.

**Figure 39: Basis of Eligibility Window**

Year	Qtr	Month	State	Code	Description
2001	1	10	MD	2	BLIND/DISABLED

OK Print

**Table 30: Basis of Eligibility Window Information**

Basis of Eligibility Window Information	
Fields	Description
Year	Federal fiscal year that the beneficiary was entitled to Medicaid.
Qtr	Federal fiscal quarter that the beneficiary was entitled to Medicaid.
Month	Month that the code applies to.
State	U.S. Postal Service abbreviation for the state that submitted the Medicaid data.
Code	Beneficiary's basis of eligibility for Medicaid.  <div> 0      Not Medicaid eligible  1      Aged  2      Blind/Disabled  3      Not Used  4      Child  5      Adult  6      Child of unemployed adult  7      Unemployed adult  8      Foster care child  9      Unknown </div>
Description	Short description of the MAS code.
Buttons	Description
OK	Returns to the Medicaid tab.
Print	Prints the current screen.

**Instructions**

*To view the basis of eligibility information for a beneficiary:*

- On the Medicaid tab, click the **Basis of Eligibility** button.

The Basis of Eligibility window appears with all pertinent beneficiary information populated (see Figure 39).

*To exit* from this window:

- Click the **OK** button.

The main Medicaid tab displays.

## ERROR AND INFORMATION MESSAGES

The following table contains the MBD error messages.

**Table 31: Error Messages**

Error Number	Error Message	Error Resolution
<b>Data Base Errors:</b>		
D00001	DATABASE UPDATE ERROR	A system error has occurred.  Click <b>OK</b> and contact your system administrator.
D00002	DATABASE ROLLBACK ERROR	A system error has occurred.  Click <b>OK</b> and contact your system administrator.
<b>Data and Consistency Errors:</b>		
E00009	NINE POSITION CAN OR SSN REQUIRED	<i>Update mode only.</i>  8 positions (or fewer) of the CAN or SSN were entered on the Search Criteria window.  Click <b>OK</b> to exit window.
E00010	INVALID DATE	<i>Update mode only.</i>  An invalid date or date format has been entered.  Click <b>OK</b> and correct date.
E00023	DATE OF DEATH CANNOT BE FUTURE DATE	<i>Update mode only.</i>  The date of death cannot be a future date.  Click <b>OK</b> and correct date of death.
E00024	DATE OF DEATH CANNOT BE EARLIER THAN BENE DATE OF BIRTH	<i>Update mode only.</i>  The date of death cannot be prior to the beneficiary's date of birth.  Click <b>OK</b> and correct date of death.
E00028	TERMINATION DATE MUST BE GREATER THAN EFFECTIVE DT	<i>Update mode only.</i>  A termination date was entered on a beneficiary address, which is less than the effective date.  Click <b>OK</b> and correct the address termination date.

Error Number	Error Message	Error Resolution
E00033	MAIL ADDRESS START DATE REQUIRED	<p><i>Update mode only.</i></p> <p>An update was made to the mailing address but no effective date was entered.</p> <p>Click <b>OK</b> and enter an effective date.</p>
E00034	RESIDENCE ADDRESS START DATE REQUIRED	<p><i>Update mode only.</i></p> <p>An update was made to the residence address but no effective date was entered.</p> <p>Click <b>OK</b> and enter an effective date.</p>
E00035	TEMP ADDRESS START DATE REQUIRED	<p><i>Update mode only.</i></p> <p>An update was made to the temporary address but no effective date was entered.</p> <p>Click <b>OK</b> and enter an effective date.</p>
E00039	LAST NAME REQUIRED	<p>The First Name was entered on the Search Criteria window without the Last Name.</p> <p>Click <b>OK</b> and enter the Last Name.</p>
E00040	INVALID POSITION FOR WILDCARD	<p>The wildcard character was entered in the first or second position of the Last Name or in the first position of the First Name.</p> <p>Click <b>OK</b> and enter another character in the First or Last name field.</p>
E00041	TEMPORARY ADDRESS CANNOT BE LONGER THAN 6 MONTHS	<p>The End Date for the Temporary address is more than 6 months after the start date.</p> <p>Click <b>OK</b> and correct End date.</p>
E00044	ENTER ADDITIONAL SEARCH CRITERIA – ROW COUNT =	<p>The result of the search exceeds 500 rows.</p> <p>Click <b>OK</b> and enter additional criteria to narrow the search.</p>
E00045	CAN, SSN OR LAST NAME IS REQUIRED	<p>Optional fields were entered on the Search Criteria window without one of the required fields.</p> <p>Click <b>OK</b> and enter a CAN, SSN or Last Name.</p>
<b>Informational messages:</b>		



Error Number	Error Message	Error Resolution
I00002	BENEFICIARY RECORD UPDATED	<i>Update mode only.</i> The Beneficiary Record was updated successfully.
I00003	BENEFICIARY RECORD NOT UPDATED	<i>Update mode only.</i> The update was canceled and the beneficiary record was not updated. Click <b>OK</b> to clear message window.
I00004	ENTER HIC TO ACCESS BENEFICIARY RECORD	You pressed the Enter key or clicked the OK button, but no HIC number had been entered. Click <b>OK</b> to clear message window.
I00005	UPDATE SUCCESSFUL	<i>Update mode only.</i> Data updated successfully. Click <b>OK</b> to clear message window.
I00006	BENEFICIARY RECORD NOT FOUND	There is no beneficiary record on the database for the HIC number that was entered. Click <b>OK</b> to clear message window and re-enter HIC number.
I00008	MATCHED TO AN INACTIVE NUMBER. ACTIVE NUMBER WILL DISPLAY.	The HICN that was entered has been cross-referenced to another number and is no longer active. Click <b>OK</b> or press Enter to display the active beneficiary record.
I00009	MATCHED ON BIC EQUATABILITY. ACTIVE NUMBER WILL DISPLAY.	The HIC number that was entered does not exist and has been BIC equated to another number. Click <b>OK</b> or press Enter to display the active beneficiary record.
<b>Warnings:</b>		

Error Number	Error Message	Error Resolution
W00001	YOU HAVE NOT SAVED YOUR CHANGES	<p><i>Update mode only.</i></p> <p>You are attempting to exit the MBD application without saving your updates.</p> <p>Click <b>OK</b> to clear message and then click <b>Update</b> to save changes or <b>Cancel</b> to cancel changes.</p>
W00002	RESIDENCE ADDRESS IS REQUIRED IF BENE DOES NOT RESIDE WITH REP PAYEE	<p><i>Update mode only.</i></p> <p>Residence address is required when you are changing the Resides with Rep Payee switch to No.</p> <p>Enter residence address or change switch to Yes.</p>
W00003	IF BENE RESIDES WITH REP PAYEE, RESIDENCE ADDRESS WILL BE TERMINATED...IS THIS OK?	<p><i>Update mode only.</i></p> <p>If the Resides with Rep Payee switch is changed to Yes, the MBD will automatically terminate the residence address with the current date.</p> <p>Click <b>Yes</b> if this is correct.</p> <p>Or</p> <p>Click <b>No</b> to cancel update and return to Bene Profile.</p>
W00004	NO VALID STREET ADDRESS...ACCEPT PO BOX?	<p><i>Update mode only.</i></p> <p>A P.O. Box has been entered in a residence address or in a mailing address for a beneficiary with no residence address.</p> <p>Click <b>No</b> if a street address can be obtained.</p> <p>Or</p> <p>Click <b>Yes</b> if the P.O. Box address is the only available address.</p>
W00005	ADDRESS HAS FAILED VERIFICATION ...ACCEPT ADDRESS ANYWAY?	<p><i>Update mode only.</i></p> <p>The address entered did not pass the Finalist address verification process.</p> <p>Click <b>Yes</b> if you wish to add the address as is.</p> <p>Or</p> <p>Click <b>No</b> to cancel update and correct address.</p>

Error Number	Error Message	Error Resolution
W00006	ADDRESS WAS UPDATED. SHOULD START DATE BE CHANGED?	<p><i>Update mode only.</i></p> <p>The address was updated but the Start Date was not changed.</p> <p>Click <b>Yes</b> if you wish to change Start Date.</p> <p>Or</p> <p>Click <b>No</b> if you wish to leave current Start Date.</p>
W00007	DOES BENE NO LONGER RESIDE WITH REP PAYEE ?	<p><i>Update mode only.</i></p> <p>A residence address has been added and the Resides with Rep Payee switch is Yes.</p> <p>Click <b>Yes</b> to add the residence address and allow the switch to be changed to No.</p> <p>Or</p> <p>Click <b>No</b> to cancel the update to residence address.</p>
W00009	DOES BENE NOW RESIDE WITH REP PAYEE?	<p><i>Update mode only.</i></p> <p>A residence address has been terminated and the Resides with Rep Payee switch is No.</p> <p>Click <b>Yes</b> to end the residence address and allow the switch to be changed to Yes.</p> <p>Or</p> <p>Click <b>No</b> to cancel the update to residence address.</p>

## **APPENDIX A: DEFINITIONS, ACRONYMS, AND ABBREVIATIONS**

**ACRONYMS:**

<b>Acronym</b>	<b>Description</b>
<b>BIC</b>	Beneficiary Identification Code
<b>BOAN</b>	Beneficiary's Own Account Number
<b>CAN</b>	Claim Account Number
<b>CCP</b>	Coordinated Care Plan
<b>CMS</b>	The Centers for Medicare and Medicaid Services
<b>CSR</b>	Customer Service Representative
<b>CWF</b>	Common Working File
<b>DOB</b>	Data Of Birth
<b>DOD</b>	Date Of Death
<b>EDB</b>	Enrollment Database
<b>EFT</b>	Electronic Funds Transfer
<b>ESRD</b>	End Stage Renal Disease
<b>FFS</b>	Fee-For-Service
<b>FIPS</b>	Federal Information Processing Standards
<b>GHP</b>	Group Health Plan
<b>GUI</b>	Graphical User Interface
<b>HCPP</b>	Health Care Prepayment Plan
<b>HICN</b>	Health Insurance Claim Number
<b>HMO</b>	Health Maintenance Organization
<b>MBD</b>	Medicare Beneficiary Database
<b>MCO</b>	Managed Care Organization
<b>MCSC</b>	Medicare Customer Service Center
<b>MQGE</b>	Medicare Qualified Government Employee

<b>Acronym</b>	<b>Description</b>
<b>MSIS</b>	Medicaid Statistical Information System
<b>MSP</b>	Medicare Secondary Payer
<b>PACE</b>	Program of All Inclusive Care for the Elderly
<b>Part A</b>	The hospital insurance provision of Medicare established by section 1811 of title XVIII of the Social Security Act, and covers inpatient hospital care, skilled nursing facility care, some home health agency services, and hospice care.
<b>Part B</b>	The supplementary medical insurance provision of Medicare established by section 1831 of title XVIII of the Social Security Act and covers services of physicians and other suppliers, outpatient care, medical equipment and supplies, and other medical services not covered by Medicare Part A, hospital insurance.
<b>PBP</b>	Plan Benefit Package
<b>PFFS</b>	Private Fee-For-Service
<b>PPO</b>	Preferred Provider Organization
<b>PSC</b>	Program Service Center
<b>PSOL</b>	Provider Service Organization (License)
<b>PSOW</b>	Provider Service Organization (Waiver)
<b>RACF</b>	Resource Access Control Facility
<b>RFB</b>	Religious and Fraternal Benefit Plan
<b>RRB</b>	Railroad Board
<b>SCC</b>	State and County Code
<b>SSA</b>	Social Security Administration
<b>SSN</b>	Social Security Number
<b>XREF</b>	Cross Reference

**ABBREVIATIONS:**

<b>Abbreviation</b>	<b>Definition</b>
<b>Addr</b>	Address
<b>Bene</b>	Beneficiary
<b>Cd</b>	Code
<b>Cnty</b>	County
<b>CO</b>	County
<b>Comm</b>	Communication
<b>Cons</b>	Consular
<b>Demo</b>	Demonstration
<b>Dt</b>	Date
<b>Eff</b>	Effective
<b>Entl</b>	Entitlement
<b>Gov't</b>	Government
<b>Ind</b>	Indicator
<b>Info</b>	Information
<b>MI</b>	Middle Initial
<b>Misc</b>	Miscellaneous
<b>Pref</b>	Preference
<b>Rep</b>	Representative
<b>Src</b>	Source
<b>ST</b>	State
<b>Term</b>	Termination